
From: [REDACTED]
Sent: Wednesday, February 12, 2014 3:13 PM
To: Phyllis Wise
Cc: Babbitt, Ellen M.
Subject: Re: Introduction

I am so pleased that you will be able to meet and think through issues and opportunities surrounding this important project!!

Sent from my iPhone

On Feb 12, 2014, at 1:29 PM, Phyllis Wise [REDACTED] wrote:

> Dear Ellen,
>
> My [REDACTED] is on [REDACTED] just north of [REDACTED]. It would be easy for me to walk to your office or for me to take a taxi to closer to where you live. I am free between 10-3, so please choose a time and place that is good for you.
>
> Truly, thanks for being willing to meet on a Saturday, Phyllis

>
> Sent from my iPad

>
>> On Feb 12, 2014, at 12:03 PM, "Babbitt, Ellen M." <emb@franczek.com> wrote:

>>
>> Phyllis: it would be a pure pleasure to meet you and discuss what sounds like a exceptionally interesting and timely plan. I could certainly myself available on Saturday; where will you be and what timing works for you? I can come to meet you. I live right here in [REDACTED], just [REDACTED], so I may be near to wherever you are meeting. Or we could certainly meet at my office, which is on South Wacker Drive near the Willis/Sears Tower.

>>
>> I so appreciate this opportunity; Jennifer, you overpraised me but I appreciate the vote of confidence!
>>
>> My contact information is below; I look forward to hearing from you and, if convenient to you, getting together this weekend.
>>
>> Ellen Babbitt
>> (312) 786-6520 (office)
>> [REDACTED] (cell)
>> Franczek Radelet PC
>> 300 S. Wacker Drive, Suite 3400
>> Chicago, IL 60606
>> emb@franczek.com
>>
>>
>>
>>
>> Ellen M. Babbitt
>> Partner
>> 312.786.6520

>> emb@franczek.com

>>

>> Franczek Radelet P.C.

>> Celebrating 20 Years | 1994-2014

>>

>> 300 South Wacker Drive

>> Suite 3400

>> Chicago, IL 60606

>> 312.986.0300 - Main

>> 312.986.9192 - Fax

>> www.franczek.com

>>

>> -----

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>> (ii) promoting, marketing or recommending to another party any

>> transaction or tax-related matter herein.

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>> -----

>>

>> -----

>> From: Phyllis Wise [REDACTED]

>> Sent: Wednesday, February 12, 2014 12:49 PM

>> To: Jennifer Woodard

>> Cc: Babbitt, Ellen M.

>> Subject: Re: Introduction

>>

>> Dear Jennifer,

>> Thank you so much for the e-introduction.

>>

>> Ellen,

>> I look forward to meeting you and learning more. I will be in Chicago this weekend and have quite a bit of flexibility, particularly on Saturday. I am not sure you are willing to spend weekend times working. But if you are, this might work for me.

>>

>> Looking forward to meeting you and learning more, Phyllis

>>
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>> Sent from my iPad
>>
>> On Feb 12, 2014, at 10:42 AM, Jennifer Woodard [REDACTED] wrote:
>>
>> Dear Phyllis and Ellen,
>>
>> With this e-mail, I am introducing the two of you to one another. Ellen, Phyllis is the Chancellor of the University of Illinois (Champaign-Urbana) and is leading the U of I's most important initiative to create an engineering-driven College of Medicine which will be independently accredited. Phyllis, Ellen is my brilliant classmate from NU Law who has focused her legal career in the higher education area and has a particular expertise in the area of accreditation (among other things).
>>
>> I have spoken with each of you about the other, and I know that it would be beneficial for you to find a time to meet/talk. I am hopeful that you can schedule a date to do so soon, because I know that Ellen can provide wise counsel and help us achieve our objective.
>>
>> Phyllis, Ellen's office number is: 312-786-6520.
>>
>> Warmest regards,
>>
>> Jennifer
>>
>>

From: Phyllis Wise [REDACTED] >
Sent: Wednesday, February 12, 2014 10:42 PM
To: [REDACTED]
Subject: Re: Introduction

I had a very good discussion with Christophe today. Expect a phone call from him - it will be good news. I'll let you know more as soon as I have time to call.

Sent from my iPad

> On Feb 12, 2014, at 5:21 PM, [REDACTED] wrote:
>
> Let me know how I can help/ support.! I am also arranging mtg with Estrada re IMD Commission appointment and will use to frame project discussion. Have message into Sinsheimer tonight re capital \$\$ for infrastructure needs. Will keep you posted.
>
> Sent from my iPhone
>
>> On Feb 12, 2014, at 7:12 PM, Phyllis Wis [REDACTED] wrote:
>>
>> You never take a breath. I'm arranging meetings with Estrada and Koritz. Already have meetings with Strobel and Fitzgerald. I hope these go well. Will let you know.
>>
>> Sent from my iPad
>>
>>> On Feb 12, 2014, at 1:48 PM, [REDACTED] wrote:
>>>
>>> I have a date to speak with Jim Tyree tomorrow morning (former COO of Abbott) and chair of IMD advisory council. Briefed Warren Ribley on project this morning in advance of his meeting with Chris K and Jay Doherty tomorrow. Warren on board. Call in to Bill Strong re communication support.
>>>
>>> More later. Hope all goes well with Nike.
>>>
>>> Sent from my iPhone
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From: Jennifer Woodard <[REDACTED]>
Sent: Thursday, February 13, 2014 11:39 AM
To: Phyllis Wise
Subject: Re: Introduction

I had an excellent conversation with Jim Tyree (former COO Abbott and a private VC and chair of IMD advisory council) this morning and briefed him on our project. He is enthusiastic and will support. I will reach out to other members of our IMD advisory council now that Jim has been informed and is on board.

I also spoke with John Sinsheimer this morning at length (State of IL Director of Capital Markets). John has become a trusted friend and advisor re. capital issues and (at my request to the Gov) was seconded to the IMD as our Interim CFO and remains with us as our bond consultant. He told me that he closed on a \$1 billion dollar bond offering today. The proceeds are generally earmarked for infrastructure. There will be an additional State bond offering in April (it is anticipated). The Governor's budget address has been kicked back until after the primary. It was John's thought (with which I concur) that we get in front of the Governor with this project prior to that address so that he could include it in his remarks. As we have discussed, the framing will be about attracting talent to IL and economic development. There MAY be some capital \$\$ for renovation/new building. Much will depend on whether or not the income tax remains at - or close to - the current level. The State budget shortfall (should the tax roll back to old lower level) will be \$2 billion in 2015. Much about which to ponder, but I think beginning to work out the messaging to the Governor is important. (It will be similar to the briefing to the Republican nominee).

More after I am briefed on the discussion today with Chris K which will take place at 3p.m. at the Merchandise Mart at Chris' office.

Onward!

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>>>> Phyllis, Ellen's office number is: 312-786-6520.

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>>>> Warmest regards,

>>>>

>>>> Jennifer

>>>>

>>>>

From: Babbitt, Ellen M. <emb@franczek.com>
Sent: Saturday, February 15, 2014 6:48 AM
To: Phyllis Wise
Subject: Re: Introduction

Very good; I look forward to it.

Ellen

Ellen M. Babbitt
(312) 786-6520 (office)
[REDACTED] (cell)

On Feb 13, 2014, at 11:02 PM, "Phyllis Wise" [REDACTED] > wrote:

Ellen,

The South Water Kitchen at noon sounds perfect. I'll see you there.

Again, thanks for taking the time on a weekend.

Phyllis

On Thursday, February 13, 2014 7:39 PM, "Babbitt, Ellen M." <emb@franczek.com<mailto:emb@franczek.com>> wrote:
What a good idea! Since you will be up in the East Water area, would you like to meet at the South Water Kitchen at the Hotel Monaco? At noon on Saturday? Or anytime that works for you. I can make a reservation.

And, no, I was the one who missed the last e-mail! I apologize but look forward to meeting you. Please let me know what time and place might be good on Saturday.

Ellen

Ellen M. Babbitt
(312) 786-6520 (office)
[REDACTED] (cell)

> On Feb 13, 2014, at 5:53 PM, "Phyllis Wise" [REDACTED] wrote:

>

> Ellen,

>

> I hope I have not missed an email. Would you like to meet for lunch around noon time? Do you have a favorite place?

>

> Let me know what is best for you.

> Phyllis

>

> Sent from my iPad

>
>> On Feb 12, 2014, at 12:30 PM, Phyllis Wise [REDACTED] wrote:
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>> Dear Ellen,
>>
>> My [REDACTED] is on [REDACTED], just north of [REDACTED]. It would be easy for me to walk to your office or for me to take a taxi to closer to where you live. I am free between 10-3, so please choose a time and place that is good for you.
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>>>
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>>> -----

>>> ----

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>>> [REDACTED] <mailto:[REDACTED]>]

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>>> Cc: Babbitt, Ellen M.

>>> Subject: Re: Introduction

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>>>

>>> Warmest regards,

>>>

>>> Jennifer

>

From: Phyllis Wise [REDACTED]
Sent: Sunday, February 23, 2014 5:37 PM
To: Dick Meisinger
Subject: Fw: Notes from Meetings this week
Attachments: Tripp-Umbach Champaign-Urbana Interviews.docx

dear Dick,

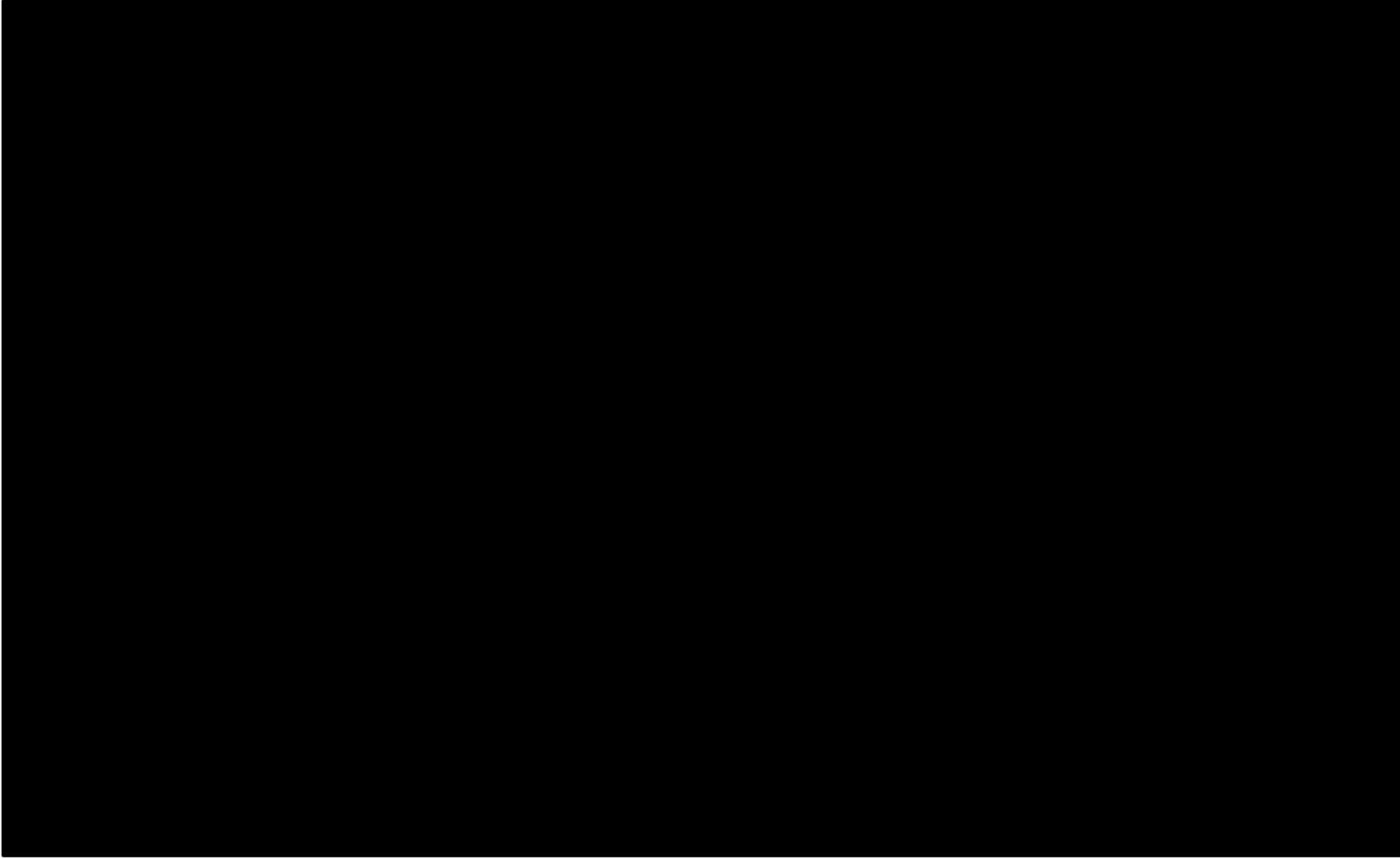
this is highly confidential. please print out a hard copy of the attachment for me.

thanks,
Phyllis

On Friday, February 21, 2014 4:20 PM, Laura Frerichs <[REDACTED]> wrote:
Thank you for connecting with me and Normand about what we learned in interviews this week.
Attached are my draft notes from all the interviews. These do not include the notes from Paul's meeting with Dean Rusch, since I was not there (at his request for a candid discussion with her).

Included in these notes in the end game strategy that Paul is defining for us, here is my draft at articulating this:

Draft





From: Babbitt, Ellen M. <emb@franczek.com>
Sent: Tuesday, March 18, 2014 2:07 PM
To: 'Phyllis Wise'
Subject: RE: Belated thank you for lunch in February

That would be wonderful; it would be a real pleasure to speak with you again. Best of luck with the white paper and financial plan (obviously, the next, best steps forward).

Ellen

From: Phyllis Wise [mailto:
[REDACTED]]
Sent: Monday, March 10, 2014 6:43 PM
To: Babbitt, Ellen M.
Subject: Re: Belated thank you for lunch in February

Dear Ellen,

It is I who should be apologizing after invading your weekend and after such a wonderful lunch filled with information. We are right now in the midst of navigating the political hurdles that we have to get through before we can consider how to approach the issues of accreditation. I have been asked to make a presentation to the Health committee of the Board of Trustees in May. We have been working on a white paper and a financial plan that will present a compelling argument for the necessity of a College of Medicine at Urbana-Champaign.

If it is alright with you, I'd like to take advantage of your advice and counsel in late spring after we have gone through these next few meetings.

Many many thanks again,
Phyllis

On Saturday, March 8, 2014 10:45 AM, "Babbitt, Ellen M." <emb@franczek.com> wrote:

Phyllis: I am unforgivably late in writing to thank you for the opportunity to meet you for lunch in February. I started a period of travel right after our lunch and really got behind on important communications (for which I apologize).

In any event, it was a great pleasure to talk with you recently (and I should note that my [REDACTED] the communications consultant, had nothing but good things to say about the communications experts whom Jennifer had identified). Since you and I met, I have been identifying medical accreditation consultants in connection with a different project, and I'd be happy to share that information if it would be helpful – or to assist in any other way that might be useful to you and the University of Illinois.

I thank you again for the lunch and the chance to speak with you.

Ellen

Ellen M. Babbitt
Partner

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Message

From: [REDACTED]
Sent: 3/19/2014 6:34:47 AM
To: Phyllis Wise [REDACTED]
Subject: Re: meeting with Chris Kennedy

Rick is traveling today so I read email to him. I will print out a copy and not forward to him. We appreciate all that you are doing for the COM. Great accomplishments take perseverance and I can tell that is one of your many strengths.

Take care

[REDACTED]
Sent from my iPad

On Mar 19, 2014, at 12:36 AM, Phyllis Wise [REDACTED] m> wrote:
Rick,

I may be getting paranoid, but since someone has FOled all of the emails that Laura Frerichs has exchanged between herself and the internal and external advisory board members with regards to the COM, I am using my personal email and sending it to [REDACTED] personal email. Please see the email below that I just sent to Robin Kaler's personal email with instructions as to how to get it to everyone else. I know that you were [REDACTED] today, so I wanted to get you this information as quickly as I could.

One more thing that I forgot to put in the email below is that Chris wants to talk with Bob and me about the timing of when I would present to the Board committee. This would not be good, but I need to figure out what whether we can begin other steps (e.g. our faculty senate) before I get Board approval.

Best,
Phyllis

On Tuesday, March 18, 2014 11:30 PM, Phyllis Wise [REDACTED] wrote:
Dear Robin,

Please print this email out and ask Phyllis to hand carry it to all of the people below. If you want to try to put this in BOX, that is fine with me. Someone, who is out to get Laura, has asked for all email exchanges between her and all of the internal and external advisory board members. So I want us to be really careful.

I will try to call Jim and Rick since I know they want to know quickly how things went. I have already spoken with Peter and I am at a meeting with Greg tomorrow and can give him a heads up.

Peter Fox
Jim Leonard
Greg Lykins
Chris Meyer
Rick Stephens
Jennifer Woodard

Laura Frerichs

Ade
Mike DeLorenzo
Pradeep Khanna
Normand Paquin
Dan Peterson
Peter Schiffer

I met with Chris Kennedy today (March 18, 2014). I went through all of the points that you all helped to prepare. I showed him the AAU data and the bubble diagram showing how this would impact the state, Chicago, central Illinois, Urbana-Champaign, and our campus. I told him about the BCD study and about Tripp Umbach. I gave him Paul's contact information and offered to make an e-introduction. He said he would call himself. I did not explain the 501C3 concept because we did not have time.

He started out saying: "I want to be super supportive". But the rest of the conversation was a litany of why we won't be able to get this done.

1. He doesn't think we have a real strategic plan and until we do, we cannot figure out how this fits into our long term plans. He was not complimentary of our plan, said that we had not gotten Board approval before sharing it with others. I told him that I was unaware that we (the campuses) were expected to get Board approval of our plans, and had understood that only the overall university strategic plan required Board approval. I told him that Information and Technology, Health and Wellness, and Economic Development were three of the six areas, which emerged during our discussions with
2. I did not tell him which Board members I had spoken with, but I suspect he knows. He said that talking with individual trustees was the worst kind of governance. I pointed out that if I spoke with more than two at a time, it would fall under the Open Meetings Act requirement.
3. He said that 80% of the population was in Chicagoland and that if they did not like this plan, they would kill it. He said it was a shame that Naomi and Mike Frerichs could not be helpful. He said that Rodney Davis is being targeted by the Dems. He said he was very helpful with the DMDI grant.
4. He said that Bob and he toured several FQHC's in Chicago. Each one has a community board - that if they did not like the idea, they would go to Denny Davis and he would feel obligated to bring in other legislators to kill it.
5. He urged me to talk with Mike Thomson (<http://thomsonweir.com/firm-bios/>). He said that he would be able to help with Cullerton. I did not tell him that we already had arranged a meeting. He said that Mike had fought the university previously because AT&T was one of his clients and they were again UC2B.
6. He said that Mayor Emmanuel will be against it and wants his own strong College of Engineering in Chicago and does not want to depend upon Urbana-Champaign. He said that if Rauner gets elected the two will team up and get this done - if not at UIC at Northwestern.
7. He said that if we get a COM and compete for NIH \$, that UIC will not get as much and that they will try to kill it. He said we have to get Paula, Lon and Dimitri on our side. He said "buy them out".
8. He said he would talk with Steve Koch.

9. He said that I should talk with Larry Schook since he has day-to-day contact with people in Chicago. I have heard that Larry is actively campaigning against our COM.

10 He is worried that if we create an independent COM that Peoria and Rockford will want their own. I told him that Peoria was relieved that we weren't going to make them align with us and that we would still teach the M1 year.

At the end of the meeting I re-emphasized that this was key to the future vibrancy of the Illinois economy, Chicago economy and ours. If we could not do this it would hurt all of the University of Illinois and certainly our campus. He said but there are 50 voices.

Phyllis

Message

From: [REDACTED]
Sent: 3/19/2014 6:47:23 AM
To: Phyllis Wise [REDACTED]
Subject: Re: meeting with Chris Kennedy

Hi Phyllis:

I'm glad to hear that. This is such a big task, but your vision is the clearest path to long-term viability and impact, so we will keep working to help our stakeholders understand and support that.

No, the Box doesn't protect documents from FOIA, but it does reduce the number of electronic copies floating around campus. These documents are protected from FOIA because they are notes, drafts, opinions, etc. At some point, the final versions of things that aren't notes or opinions would be releasable under FOIA.

Just a thought for the day after yesterday's meeting with that small group of faculty. One path to take on this is to rally our own faculty. They're powerful enough to have removed two presidents, a chancellor and seven trustees from office.:)

Have a wonderful day!

r

----- Original Message -----

From: "Phyllis Wise" <[REDACTED]>
To: "Robin Kaler" <[REDACTED]>
Sent: Wednesday, March 19, 2014 6:26:50 AM GMT -06:00 US/Canada Central
Subject: Re: meeting with Chris Kennedy

Robin,

I am not really discouraged, but disappointed. I was disappointed that Chris went directly to the politics and did not comment at all on the potential positive long-lasting impact of a COM. But Pam and Pat were similar, just not as strongly stated. I actually think we have a lot of this covered.

I called Jennifer Woodard to see whether she knew Mike Thomson - she does not but she encouraged me to get in contact with Jay Doherty, President of City Club, and a member of her IMD board. She said he said that he could help with Chris. I'll try to do that today. I called Tim to tell him about my conversation. He said that Chris always talks about the political implications of everything that the BOT does and that he and Ed think it is overblown.

Regardless, we will just keep on working on this. We have to get it done.

Normand sent instructions on how to get into Box. I will try that today, but I think I would rather that you go ahead with this labor-intensive old-fashioned way of doing this one. Do you think that box is secure? Can it be FOIed?

Phyllis

On Wednesday, March 19, 2014 5:26 AM, Robin Kaler [REDACTED] wrote:

Thanks. I'll take care of it.

Chin up! We can do this!

Sent from my iPhone

On Mar 18, 2014, at 11:40 PM, Phyllis Wise <[REDACTED]> wrote:

One more thing: Kennedy said that he wanted to talk with Bob and me together before he approves of my presenting to the Health Affairs committee in May. We need to figure out whether we can proceed with other steps (e.g. the academic senate) before we get board approval.

P.S. I just sent my original to Rick Stephens at his personal email address - I do not have personal emails for the other external people.

On Tuesday, March 18, 2014 11:30 PM, Phyllis Wise <[REDACTED].com> wrote:

Dear Robin,

Please print this email out and ask Phyllis to hand carry it to all of the people below. If you want to try to put this in BOX, that is fine with me. Someone, who is out to get Laura, has asked for all email exchanges between her and all of the internal and external advisory board members. So I want us to be really careful.

I will try to call Jim and Rick since I know they want to know quickly how things went. I have already spoken with Peter and I am at a meeting with Greg tomorrow and can give him a heads up.

Peter Fox
Jim Leonard
Greg Lykins
Chris Meyer
Rick Stephens
Jennifer Woodard

Laura Frerichs

Ade
Mike DeLorenzo
Pradeep Khanna
Normand Paquin
Dan Peterson
Peter Schiffer

I met with Chris Kennedy today (March 18, 2014). I went through all of the points that you all helped to prepare. I showed him the AAU data and the bubble diagram showing how this would impact the state, Chicago, central Illinois, Urbana-Champaign, and our campus. I told him about the BCD study and about Tripp Umbach. I gave him Paul's contact information and offered to make an e-introduction. He said he would call himself. I did not explain the 501C3 concept because we did not have time.

He started out saying: "I want to be super supportive". But the rest of the conversation was a litany of why we won't be able to get this done.

1. He doesn't think we have a real strategic plan and until we do, we cannot figure out how this fits into our long term plans. He was not complimentary of our plan, said that we had not gotten Board approval before sharing it with others. I told him that I was unaware that we (the campuses) were expected to get Board approval of our plans, and had understood that only the overall university strategic plan required Board approval. I told him that Information and Technology, Health and Wellness, and Economic Development were three of the six areas, which emerged during our discussions with

2. I did not tell him which Board members I had spoken with, but I suspect he knows. He said that talking with individual trustees was the worst kind of governance. I pointed out that if I spoke with more than two at a time, it would fall under the Open Meetings Act requirement.

3. He said that 80% of the population was in Chicagoland and that if they did not like this plan, they would kill it. He said it was a shame that Naomi and Mike Frerichs could not be helpful. He said that Rodney Davis is being targeted by the Dems. He said he was very helpful with the DMDI grant.

4. He said that Bob and he toured several FQHC's in Chicago. Each one has a community board - that if they did not like the idea, they would go to Denny Davis and he would feel obligated to bring in other legislators to kill it.

5. He urged me to talk with Mike Thomson (<http://thomsonweir.com/firm-bios/>). He said that he would be able to help with Cullerton. I did not tell him that we already had arranged a meeting. He said that Mike had fought the university previously because AT&T was one of his clients and they were against UC2B.

6. He said that Mayor Emmanuel will be against it and wants his own strong College of Engineering in Chicago and does not want to depend upon Urbana-Champaign. He said that if Rauner gets elected the two will team up and get this done - if not at UIC at Northwestern.

7. He said that if we get a COM and compete for NIH \$, that UIC will not get as much and that they will try to kill it. He said we have to get Paula, Lon and Dimitri on our side. He said "buy them out".

8. He said he would talk with Steve Koch.

9. He said that I should talk with Larry Schook since he has day-to-day contact with people in Chicago. I have heard that Larry is actively campaigning against our COM.

10. He is worried that if we create an independent COM that Peoria and Rockford will want their own. I told him that Peoria was relieved that we weren't going to make them align with us and that we would still teach the M1 year.

At the end of the meeting I re-emphasized that this was key to the future vibrancy of the Illinois economy, Chicago economy and ours. If we could not do this it would hurt all of the University of Illinois and certainly our campus. He said but there are 50 voices.

Phyllis

From: Phyllis Wis [REDACTED]
Sent: Wednesday, March 19, 2014 11:03 AM
To: [REDACTED]
Subject: Re: Personal from Rick

Rick,

I was disappointed yesterday, but not discouraged (at least only momentarily). Chris doesn't know me well enough to know that when someone tells me that I "can't do something" it just makes me work harder to prove them wrong.

I did not tell him about all the people we have already met with because I didn't want him to think that he was the last person to know. But I think we have many of the bases covered. He doesn't know that I already have a meeting set up with Cullerton; am trying with Durbin; haven't figured out Madigan; need to figure out when whether to get a meeting with Rauner and Quinn.

I have the quiet support of UIC leadership, but they will never say this out loud.

I'm even more convinced that we have to do this for the state, for Urbana-Champaign and for the university, particularly UIUC.

So onward, and thank you for all your support and advice. You always have the most insightful advice whether you are in the room or on the phone.

Best,
Phyllis

Sent from my iPad

On Mar 19, 2014, at 9:17 AM, [REDACTED] wrote:

-----Original Message-----

From: Rick Stephens <rick@investres.net>
To: [REDACTED]
Sent: Wed, Mar 19, 2014 8:57 am
Subject: Personal from Rick

Good morning Phyllis.

I am so sorry. I thought about you often yesterday, praying that God would go before you and prepare Mr. Kennedy's heart to see the benefits. And that you would feel Gods peace during the meeting. You are a good woman with a right heart. I'm sorry you had to face such an open and raw display of politics at its most evil.

Well, overall you've had a string of positive conversations, and clear guidance

from all the outside experts that the COM is right on target for the good of the state, U of I system, UC, and retention of the high ranking of the college of Engineering. One could have been thinking that the obvious good of the project would overpower self interests and it was going to be smooth sailing. We just got put in our place.

Woulda been nice but the fact remains - this is an impossible task, which is really exciting! I almost feel like we're going up against the President of the United States because Kennedy and Immanuel are together on this, and Immanuel has the President's personal cell number and Chicago is high on his list too. That's a lot of power wanting more power! Couldn't be facing anything bigger.

However, I have believed from the start that this project will only happen if God is behind it. And the good news is the most powerful people in the world have no power over God.

So now we know what we're up against. Guess it's time to regroup with consultants and staff to lay out strategy based on knowing better where the opposition stands. Let's go get 'em Phyllis!

Rick

From: Bales, Greg (Durbin) <Greg_Bales@durbin.senate.gov>
Sent: Wednesday, March 19, 2014 5:44 PM
To: Woodard, Jennifer L
Cc: Phyllis Wise; Mischo, Phyllis A
Subject: RE: UIUC initiative

Jennifer –

Glad we connected just now.

I'm checking to see if there's any chance of making something work with his schedule tomorrow or Friday, but it's probably going to be difficult.

I've flagged this for other staff, too, to see how we can get involved and be helpful.

I'll report back, thanks!

Greg Bales
Suburban Outreach Coordinator
Office of U.S. Senator Dick Durbin
230 S. Dearborn St., Suite 3892
Chicago, Illinois 60604
312.353.4952 Office | 312.353.0152 Direct [REDACTED] Cell

For news, updates, and more follow Senator Durbin on [Facebook](#), [Twitter](#) or his [E-Newsletter](#).

From: Woodard, Jennifer L [<mailto:jwoodard@uiillinois.edu>]
Sent: Wednesday, March 19, 2014 5:08 PM
To: Bales, Greg (Durbin)
Cc: Phyllis Wise; Mischo, Phyllis A
Subject: UIUC initiative
Importance: High

Greg,

As per our conversation today, I think it would be terrific if Chancellor Phyllis Wise could brief Senator Durbin on an exciting an important initiative being considered and for which a feasibility study has been commissioned. The concept is to leverage the extraordinary assets of the U of I and the State of Illinois which are the College of Engineering and the National Center for Supercomputing Applications located in Urbana and combine them with medical training in a uniquely niched College of Medicine. The College of Engineering, ranked among the top five in the country, attracts talented faculty and students and is renowned around the world. With the evolution of health care and research, it is more important than ever that the disciplines of engineering and medicine be joined to solve the problems and challenges in the delivery of health care, of population health management, and – by doing so – reduce the costs to each and every patient. We also believe that this initiative has the potential to be a talent magnet and an economic engine for the State of Illinois. As President of the IMD, I can say that we are looking forward to having this missing piece of the innovation ecosystem be a pipeline for development in the IMD.

Chancellor Wise will be in Springfield tomorrow speaking to the Illinois Chamber of Commerce. If the Senator's schedule would permit, it would be terrific if the Chancellor could brief him on this initiative. If that is not feasible tomorrow, I am hopeful that they can find a time soon to get together. As always, Greg, I enjoy our conversations!

Best,

Jennifer

Message

From: Phyllis Wise [REDACTED]
Sent: 3/19/2014 6:54:56 PM
To: [REDACTED]
Subject: Fwd: meeting with Chris Kennedy

Dear Greg and Jim,

Here is the email that I wrote and am having Robin give in hard copy to folks unless I have their personal emails.

Sent from my iPad

Begin forwarded message:

I met with Chris Kennedy today (March 18, 2014). I went through all of the points that you all helped to prepare. I showed him the AAU data and the bubble diagram showing how this would impact the state, Chicago, central Illinois, Urbana-Champaign, and our campus. I told him about the BCD study and about Tripp Umbach. I gave him Paul's contact information and offered to make an e-introduction. He said he would call himself. I did not explain the 501C3 concept because we did not have time.

He started out saying: "I want to be super supportive". But the rest of the conversation was a litany of why we won't be able to get this done.

1. He doesn't think we have a real strategic plan and until we do, we cannot figure out how this fits into our long term plans. He was not complimentary of our plan, said that we had not gotten Board approval before sharing it with others. I told him that I was unaware that we (the campuses) were expected to get Board approval of our plans, and had understood that only the overall university strategic plan required Board approval. I told him that Information and Technology, Health and Wellness, and Economic Development were three of the six areas, which emerged during our discussions with
2. I did not tell him which Board members I had spoken with, but I suspect he knows. He said that talking with individual trustees was the worst kind of governance. I pointed out that if I spoke with more than two at a time, it would fall under the Open Meetings Act requirement.
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4. He said that Bob and he toured several FQHC's in Chicago. Each one has a community board - that if they did not like the idea, they would go to Denny Davis and he would feel obligated to bring in other legislators to kill it.
5. He urged me to talk with Mike Thomson (<http://thomsonweir.com/firm-bios/>). He said that he would be able to help with Cullerton. I did not tell him that we already had arranged a meeting. He said that Mike had fought the university previously because AT&T was one of his clients and they were again UC2B.

6. He said that Mayor Emmanuel will be against it and wants his own strong College of Engineering in Chicago and does not want to depend upon Urbana-Champaign. He said that if Rauner gets elected the two will team up and get this done - if not at UIC at Northwestern.

7. He said that if we get a COM and compete for NIH \$, that UIC will not get as much and that they will try to kill it. He said we have to get Paula, Lon and Dimitri on our side. He said "buy them out".

8. He said he would talk with Steve Koch.

9. He said that I should talk with Larry Schook since he has day-to-day contact with people in Chicago. I have heard that Larry is actively campaigning against our COM.

10 He is worried that if we create an independent COM that Peoria and Rockford will want their own. I told him that Peoria was relieved that we weren't going to make them align with us and that we would still teach the M1 year.

At the end of the meeting I re-emphasized that this was key to the future vibrancy of the Illinois economy, Chicago economy and ours. If we could not do this it would hurt all of the University of Illinois and certainly our campus. He said but there are 50 voices.

Phyllis

From: Woodard, Jennifer L <jwoodard@uillinois.edu>
Sent: Friday, March 21, 2014 4:12 PM
To: Phyllis Wise; Paquin, Normand
Subject: FW: <no subject>

FYI

From: Kellar Josh <Kellar.Josh@bcg.com>
Date: Friday, March 21, 2014 4:10 PM
To: Jennifer Woodard <jwoodard@uillinois.edu>
Subject: RE: <no subject>

Thank you for sharing this visionary and inspirational document with me Jennifer. I'm so looking forward to discussing with you further. Such a fascinating endeavor, and one that I think is coming about at exactly the right time!

I also look forward to discussing some of the work we did recently with another supercomputing center interested in building their biological modeling and Big Data capabilities, since much of it will likely align with this vision.

Look forward to talking soon.

All best,
Josh

Josh Kellar, Ph.D.
Project Leader
THE BOSTON CONSULTING GROUP
Tel. +1 312 993 3969 • Mobile +1 312 961 9735

From: Woodard, Jennifer L [<mailto:jwoodard@uillinois.edu>]
Sent: Friday, March 21, 2014 11:05 AM
To: Kellar Josh
Subject: <no subject>

FYI

The Boston Consulting Group, Inc.

This e-mail message may contain confidential and/or privileged information. If you are not an addressee or otherwise authorized to receive this message, you should not use, copy, disclose or take any action based on this e-mail or any information contained in the message. If you have received this material in error, please advise the sender immediately by reply e-mail and delete this message. Thank you.

From: Woodard, Jennifer L <jwoodard@uillinois.edu>
Sent: Friday, March 21, 2014 4:21 PM
To: Paquin, Normand; Phyllis Wise
Cc: Paul Umbach
Subject: FW: Your BCG team is here to be your thought partner

We have strong allies here, I am happy to say.

From: Michelle Russell <russell.michelle@bcg.com>
Date: Friday, March 21, 2014 4:16 PM
To: Jennifer Woodard <jwoodard@uillinois.edu>
Subject: Your BCG team is here to be your thought partner

Hi Jennifer,

I wanted to share Josh's energy after he reviewed your draft U of I materials. We are happy to be behind the scenes advisors on this.

Best,
Michelle

Michelle Russell
Partner and Managing Director
THE BOSTON CONSULTING GROUP
Tel. +1 312 627 2604 • Mobile +1 312 286 5963

From: Kellar Josh
Sent: Friday, March 21, 2014 4:12 PM
To: Russell Michelle

Very interesting. A lot of parallels with the work we did with Livermore, actually, given the set of capabilities they had and the adjacency they were trying to move into. What a cool opportunity for us to potentially help out here. Look forward to talking about it more with you and Jennifer!

Josh

Josh Kellar, Ph.D.
Project Leader
THE BOSTON CONSULTING GROUP
Tel. +1 312 993 3969 • Mobile +1 312 961 9735

This e-mail message may contain confidential and/or privileged information. If you are not an addressee or otherwise authorized to receive this message, you should not use, copy, disclose or take any action based on this e-mail or any information contained in the message. If you have received this material in error, please advise the sender immediately by reply e-mail and delete this message. Thank you.

To: Paquin, Normand; Kaler, Robin Neal
From: Woodard, Jennifer L
Cc: Phyllis Wise
Subject: <no subject>
Sent: Fri Mar 21 16:28:52 2014
Importance: Normal

Teleconference set with Brian Fabes for next Tuesday at 4. Progress. He has the draft concept paper to review in advance and understands this is confidential.

Message

From: Phyllis M Wise [REDACTED]
Sent: 3/23/2014 6:56:06 PM
To: Paul Umbach [PUmbach@trippumbach.com]
CC: Ha Pham [HPham@trippumbach.com]
Subject: Re: Quick weekend update from Paul Umbach

Paul,

Thank you for your email and vm. I agree with your strategy. CK's email is [REDACTED]

I will work with Nomand to get you access to read and put material on the box site.

I will begin to work on the extension of your contract.

Is it alright if I forward your email to Ade's personal email?

Phyllis

Sent from my iPhone

On Mar 24, 2014, at 3:18 AM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Dear Phyllis:

I hope all is well with your trip (or prep for the trip). Ha and I are working over the next three days intensively on our report. I am using your personal email as I have a few confidential thoughts:

- After thinking about it, I do not believe (from experience) that Chris Kennedy is going to call me. Lots of reasons, but mostly that he gains very little from talking with someone at my "level". So, I want to reach out to him proactively so that in the future I can say, "I tried repeatedly to gather your input as the Chair of the Board." Would put me and him in different lights. So, could you please send me his contact information as I will be extra persistent.
- We will be reaching out to everyone on the committee to request any and all documents and notes that might be helpful in our report. I know that our report is "independent" but I don't want to have it miss out on all the great work your team has completed.
- I am going with the plan of listing Carle FIRST in the report as they were an equal partner and that is it appropriate to list clients in alpha order. What I am saying is that we need to have Carle out front to protect you a bit from the President and Chair.
- Finally, I would rather put the time into your report than a contract extension document. We will cross that bridge later when I get some time. I am thinking a six month extension from April 15th through October 15th for comprehensive services – bi-weekly meetings and other on-site services for \$180k plus travel to be divided equally between you and Carle. This is a typical budget for implementation and business planning – could be less or more depending on your needs but I will go with this amount as a starting point.

I hope this is helpful.

Take care and best of luck on your trip. Don't worry, all will be good!

Paul

Paul O. Umbach

Founder and President

Tripp Umbach

2359 Railroad St. #3701

Pittsburgh, PA 15222

Corporate Headquarters: 412.281.2313

Cell Number: [REDACTED]

Fax Number: 412.281.9946

www.trippumbach.com

"Turning ideas into action for 25 years"

From: Phyllis M Wise [mailto:
Sent: Sunday, March 23, 2014 7:47 PM
To: Ha Pham
Cc: Paul Umbach
Subject: Re: Quick weekend update from Paul Umbach

Thanks. And thanks for all the work you are doing!

Sent from my iPhone

On Mar 24, 2014, at 6:14 AM, Ha Pham <HPham@trippumbach.com> wrote:

Hi Phyllis-

Thank you – you have been very helpful. Paul and I are saving our own documents from the drop box (we do not need to edit any documents). We appreciate you assisting us.

Ha

From: Phyllis M Wise [mailto:
Sent: Sunday, March 23, 2014 8:40 PM
To: Paul Umbach
Cc: Ha Pham
Subject: Re: Quick weekend update from Paul Umbach

Paul,

Laura just emailed and said she had made you a viewer this afternoon. Do you want to be able to edit documents and add documents?

Phyllis

Sent from my iPhone

On Mar 24, 2014, at 3:18 AM, Paul Umbach <PUMBACH@trippumbach.com> wrote:

Dear Phyllis:

I hope all is well with your trip (or prep for the trip). Ha and I are working over the next three days intensively on our report. I am using your personal email as I have a few confidential thoughts:

- After thinking about it, I do not believe (from experience) that Chris Kennedy is going to call me. Lots of reasons, but mostly that he gains very little from talking with someone at my “level”. So, I want to reach out to him proactively so that in the future I can say, “I tried repeatedly to gather your input as the Chair of the Board.” Would put me and him in different lights. So, could you please send me his contact information as I will be extra persistent.

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"Turning ideas into action for 25 years"

From: Phyllis M Wise [REDACTED]
Sent: Sunday, March 23, 2014 8:28 PM
To: Paul Umbach
Subject: Re: Good night email!

Dear dear friend,

What an amazing email from a more amazing person. I will read this many times as we move forward.

I am afraid that I am hosting a dinner on Sunday, so won't be able to join you for dinner. If you think we need to meet prior to our large group meeting, we can find time on Monday morning.

I am going to forward an email exchange between Jim L and me. I hope I don't sense any hesitancy on his part.

Phyllis

Sent from my iPhone

On Mar 24, 2014, at 6:32 AM, Paul Umbach <PUMBACH@trippumbach.com> wrote:

Hey friend:

Sadly this is just part of the game in highly charged projects – and after reading the history of the school (note the key word “Treaty” in the document from the 1970’s – i.e. Watergate?) -- clearly the temperature on this issue has been high for a very long time. I have the following thoughts on the CK email to Bob:

1. You are doing a WONDERFUL job pushing this project as he is scared that you will succeed – or he wouldn’t be calling for the personnel committee to reign you in. The highest complement for a chancellor in my opinion.
2. The best idea always wins over politics – and Chris actually knows this deep in his heart.
3. It is time to HIDE out for a while and let my report take the bullets – not you or your team. We will be there in force on April 7th – actually the 6th if you are up for dinner!

Have a great trip. Oh, the answer to your question. This is about as bad as it gets with medical school politics – but remember that Martin Luther gave up on changing the curriculum and the University of Wittenberg in the mid 1500s – believing that reforming the Catholic church would be an easier thing to accomplish than changing the University! ☺

Bye for now.

Paul

Paul O. Umbach

Founder and President

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"Turning ideas into action for 25 years"

From: Phyllis M Wise [mailto:[REDACTED]]
Sent: Sunday, March 23, 2014 8:16 PM
To: Paul Umbach
Subject: Fwd: Box and Umbach

Meant to cc you. Did I read to you CK's email to Bob, which Bob gave me a hardcopy? A bit intimidating. Have you ever dealt with this level of politics? I am not discouraged but a bit disappointed.

Sent from my iPhone

Begin forwarded message:

From: Phyllis M Wise [REDACTED] >
Date: March 24, 2014 at 5:34:42 AM GMT+5:30
To: Paquin Normand <paquin@illinois.edu>
Cc: Frerichs Laura <lfrerich@illinois.edu>
Subject: Box and Umbach

Normand,

It would be important for you to allow Paul to have access to the COM box as a reader and contributor /editor. The sooner you can do this the better so that he can write the feasibility report with the maximum amount of information.

Sent from my iPhone

From: Phyllis M Wis [REDACTED]
Sent: Sunday, March 23, 2014 10:17 PM
To: Paul Umbach
Subject: Re: I would like to touch base with you before finalizing the feasibility study report

Paul,

I hope you are in bed and don't read this until morning. I agree with your assessment of Carle. But interestingly their hospital ranks as #6 in the state (OSF ranks #26, UIC's hospital #31.) I don't remember who does the ranking and what it is based on. I probably can find it for you if you need it. Carle wants to be [REDACTED]

[REDACTED] It will be critical that you present the feasibility to his executive committee. I should be the side show, if I present at all. I have some credibility since the ones who know me think that I have done a good job as Chancellor.

Phyllis

Sent from my iPhone

On Mar 24, 2014, at 8:20 AM, Paul Umbach <PUMBACH@trippumbach.com> wrote:

Sure – no problem!

One way I can help you and the project is to keep Jim engaged and feeling very important. I know that in the next phase I will need to spend lots of time over at Carle to get them up to speed.

[REDACTED]

Certainly, I do value but don't really need his input for the report, but we all DO need his buy in for future. I know you know this too.

Good night.

Paul

Paul O. Umbach

Founder and President

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From: Wise, Phyllis M [<mailto:pmwise@illinois.edu>]
Sent: Sunday, March 23, 2014 10:41 PM
To: Paul Umbach
Subject: Re: I would like to touch base with you before finalizing the feasibility study report

Thanks for copying me.

Sent from my iPhone

On Mar 24, 2014, at 7:28 AM, "Paul Umbach" <PUMBACH@TRIPPUMBACH.COM> wrote:

Dear Jim:

We are working day and night on the final feasibility report and are confident that our document will provide a solid foundation or springboard (whatever analogy you prefer) for this exciting joint venture medical school.

While I know that your schedule is nearly impossible, I would appreciate the opportunity to get your final input before our report is completed. Certainly there are many moving pieces involving your health system to make this vision a reality and I want to go over these key "check points" or milestones that Carle would need to meet, before you read them "cold".

I am sorry for the ultra quick timetable – but believe that I will have the opportunity to provide more assistance after April 1st as needed. It will be important to have the summer to develop a strong business plan and implementation strategy. I have been in touch briefly with Phyllis on the topic of extending our agreement and will be back with you formally after we complete this phase.

Would you have a few minutes to talk by phone on Friday morning? I will be driving to Washington DC from Pittsburgh in the morning and can work around your schedule. I can also talk after 4 pm your time on Wednesday and Thursday.

Thanks for being in touch with me and for your leadership and support of this most exciting project.

Sincerely,

Paul

Paul O. Umbach
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Tripp Umbach
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"Turning ideas into action for 25 years"

From: Paquin, Normand <paquin@illinois.edu>
Sent: Monday, March 24, 2014 4:10 AM
To: Phyllis M Wise
Cc: Frerichs, Laura Appenzeller
Subject: RE: Box and Umbach

Phyllis,

I'm pleased to say that their access has not been changed from what Laura set up for them.

Best, Normand

-----Original Message-----

From: Phyllis M Wise [mailto:[\[REDACTED\]](#)]
Sent: Monday, March 24, 2014 3:18 AM
To: Paquin, Normand
Cc: Frerichs, Laura Appenzeller
Subject: Re: Box and Umbach

Normand and Laura,

Ha told me that what Laura set up is fine. So there is no need to change anything. Thanks for everything.

Phyllis

Sent from my iPhone

> On Mar 24, 2014, at 12:39 PM, "Paquin, Normand" <paquin@illinois.edu> wrote:

>

> Thank you Laura.

>

> -----Original Message-----

> From: Frerichs, Laura Appenzeller
> Sent: Sunday, March 23, 2014 7:43 PM
> To: Phyllis M Wise; Paquin, Normand
> Subject: RE: Box and Umbach

>

> Phyllis,

>

> I will check back with Paul again. I spoke with him earlier today about some things he wanted to discuss with you related to CK.

>

> Laura

>

> -----Original Message-----

> From: Phyllis M Wise [mailto:[\[REDACTED\]](#)]
> Sent: Sunday, March 23, 2014 7:36 PM
> To: Frerichs, Laura Appenzeller
> Cc: Paquin, Normand

> Subject: Re: Box and Umbach
>
> It would be good for you to talk with him to see whether this is all
> he needs. I am in India and it is difficult to call. I will if
> necessary
>
> Sent from my iPhone
>
>> On Mar 24, 2014, at 5:52 AM, "Frerichs, Laura Appenzeller" <lfrerich@illinois.edu> wrote:
>>
>> Phyllis and Normand,
>>
>> I made Paul a viewer on the folders that I thought were okay to share earlier this afternoon. That allows him to view and download, but not upload or modify. I think he now has what he needs.
>>
>> Laura
>>
>> Laura A. Frerichs
>> Director, University of Illinois Research Park Director, Economic
>> Development, University of Illinois at Urbana-Champaign
>> (217) 333-8323
>> lfrerich@illinois.edu
>> www.researchpark.illinois.edu
>>
>>
>> -----Original Message-----
>> From: Phyllis M Wise [mailto:>> Sent: Sunday, March 23, 2014 7:05 PM
>> To: Paquin, Normand
>> Cc: Frerichs, Laura Appenzeller
>> Subject: Box and Umbach
>>
>> Normand,
>>
>> It would be important for you to allow Paul to have access to the COM box as a reader and contributor /editor. The sooner you can do this the better so that he can write the feasibility report with the maximum amount of information.
>>
>> Sent from my iPhone

From: Phyllis Wise [REDACTED]
Sent: Monday, March 24, 2014 7:46 AM
To: Adesida Ilesanmi
Subject: Fwd: Quick weekend update from Paul Umbach

Another addition.

Sent from my iPad

Begin forwarded message:

From: Ha Pham <HPham@trippumbach.com>
Date: March 24, 2014 at 6:14:48 AM GMT+5:30
To: 'Phyllis M Wise' [mailto:[REDACTED]], Paul Umbach <PUmbach@trippumbach.com>
Subject: RE: Quick weekend update from Paul Umbach

Hi Phyllis-

Thank you – you have been very helpful. Paul and I are saving our own documents from the drop box (we do not need to edit any documents). We appreciate you assisting us.

Ha

From: Phyllis M Wise [mailto:[REDACTED]]
Sent: Sunday, March 23, 2014 8:40 PM
To: Paul Umbach
Cc: Ha Pham
Subject: Re: Quick weekend update from Paul Umbach

Paul,

Laura just emailed and said she had made you a viewer this afternoon. Do you want to be able to edit documents and add documents?

Phyllis

Sent from my iPhone

On Mar 24, 2014, at 3:18 AM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Dear Phyllis:

I hope all is well with your trip (or prep for the trip). Ha and I are working over the next three days intensively on our report. I am using your personal email as I have a few confidential thoughts:

- After thinking about it, I do not believe (from experience) that Chris Kennedy is going to call me. Lots of reasons, but mostly that he gains very little from talking with someone at my “level”. So, I want to reach out to him proactively

so that in the future I can say, "I tried repeatedly to gather your input as the Chair of the Board." Would put me and him in different lights. So, could you please send me his contact information as I will be extra persistent.

- We will be reaching out to everyone on the committee to request any and all documents and notes that might be helpful in our report. I know that our report is "independent" but I don't want to have it miss out on all the great work your team has completed.
- I am going with the plan of listing Carle FIRST in the report as they were an equal partner and that is it appropriate to list clients in alpha order. What I am saying is that we need to have Carle out front to protect you a bit from the President and Chair.
- Finally, I would rather put the time into your report than a contract extension document. We will cross that bridge later when I get some time. I am thinking a six month extension from April 15th through October 15th for comprehensive services – bi-weekly meetings and other on-site services for \$180k plus travel to be divided equally between you and Carle. This is a typical budget for implementation and business planning – could be less or more depending on your needs but I will go with this amount as a starting point.

I hope this is helpful.

Take care and best of luck on your trip. Don't worry, all will be good!

Paul

Paul O. Umbach

Founder and President

Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313
Cell Number [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

"Turning ideas into action for 25 years"

From: Phyllis Wise [REDACTED]
Sent: Monday, March 24, 2014 1:05 PM
To: Ilesanmi Adesida
Subject: Re: Good night email!

Ade,

When Bob handed me the email, he said CK was not mad. You sure could not tell it from the email so I don't know whether they talked about it over the phone or what. I called Ed McM and told him because I wanted his advice and told him that if this was brought up in an Executive session of the BOT, I hoped he understood that the Chamber of Commerce talk had been planned months ago, and that the timing of that on the same day as the Cullerton meeting and right after I spoke with CK was totally fortuitous and arranged by Mike Frerichs (not me). Chris was the one who urged me to talk with Mike Thomson, so I was just following his orders.

Ed was pretty shocked and I am sure that he is likely to tell Tim. I did not tell any other member of the board. I did talk with Scott Rice so he is prepared in case Tom Bearrows talks with him.

I called Devon Bruce, the person that Peter Fox introduced me to who knows Quinn really well and was going to contact him after my conversation. I told him not to talk with the Gov yet and not until after the Tripp Umbach report comes out. He gave me an earful about what he (and many others he knows) thought of CK.

It's good that I am in India and have some time to just think about other things. I do not have any meetings with anyone planned for before the April 7-8 meetings, so I don't have to cancel anything that would be beyond "the limits of my authority."

BTW when I told CK that I hoped that the idea of a COM would be judged on its merits, CK said it was in fairyland.

You got so much done when you were the Dean of COE. You have to leave somethings for others to do. And you chose a fantastic dean to follow in your footsteps.

Oh well, enjoy your travels. I'll see you in London.
Phyllis

Sent from my iPad

On Mar 24, 2014, at 9:13 PM, Ilesanmi Adesida <[REDACTED]> wrote:

Phyllis,

I am still amazed that CK will be writing Bob to refer a case of personnel management to Tom Bearrows. I wonder how many of the BOT members know about this threat! I doubt that this was brought up to the other members. Is Bob doing anything about it at all?

I hope that BoT members will have the will to look at this on its merit rather than on the politics. I am very sure that a differentiated COM in Urbana will add luster to the State and add tremendous economic advantages to the area UC area and the State in the long term. Creating

ARI and COM if pursued with vim, verve, and vigor will be remembered in the years to come as entities that propelled Illinois the institution forward.

My main regret as Dean of Engineering in hindsight was that we did not create ARI earlier and with a strong presence in Chicago. We had thought about it but as usual it took too long because of the inertia of our processes. ARI should have been our ADSC in Chicago. We have a successful ADSC in Singapore, we should have seen it in Chicago before UILabs. We need an entity that will propel Chicago as a city forward and also add to the reputation of the University. UILabs is being slowly detached from U of I, that was not the vision at its creation.

Ade

On Mon, Mar 24, 2014 at 7:44 AM, Phyllis Wise [REDACTED] > wrote:
Here is the other string.

Sent from my iPad

Begin forwarded message:

From: Paul Umbach <PUMBACH@TRIPUMBACH.COM>
Date: March 24, 2014 at 6:32:28 AM GMT+5:30
To: 'Phyllis M Wise' [REDACTED]
Subject: Good night email!

Hey friend:

Sadly this is just part of the game in highly charged projects – and after reading the history of the school (note the key word “Treaty” in the document from the 1970’s – i.e. Watergate?) -- clearly the temperature on this issue has been high for a very long time. I have the following thoughts on the CK email to Bob:

1. You are doing a WONDERFUL job pushing this project as he is scared that you will succeed – or he wouldn’t be calling for the personnel committee to reign you in. The highest complement for a chancellor in my opinion.
2. The best idea always wins over politics – and Chris actually knows this deep in his heart.
3. It is time to HIDE out for a while and let my report take the bullets – not you or your team. We will be there in force on April 7th – actually the 6th if you are up for dinner!

Have a great trip. Oh, the answer to your question. This is about as bad as it gets with medical school politics – but remember that Martin Luther gave up on changing the curriculum and the University of Wittenberg in the mid 1500s – believing that reforming the Catholic church would be an easier thing to accomplish than changing the University! ☺

Bye for now.

Paul

Paul O. Umbach

Founder and President

Tripp Umbach

2359 Railroad St. #3701

Pittsburgh, PA 15222

Corporate Headquarters: [412.281.2313](tel:412.281.2313)

Cell Number: [REDACTED]

Fax Number: [412.281.9946](tel:412.281.9946)

www.trippumbach.com

"Turning ideas into action for 25 years"

From: Phyllis M Wise [[mailto:\[REDACTED\]](mailto:[REDACTED])]
Sent: Sunday, March 23, 2014 8:16 PM
To: Paul Umbach
Subject: Fwd: Box and Umbach

Meant to cc you. Did I read to you CK's email to Bob, which Bob gave me a hardcopy? A bit intimidating. Have you ever dealt with this level of politics? I am not discouraged but a bit disappointed.

Sent from my iPhone

Begin forwarded message:

From: Phyllis M Wise [REDACTED]n>
Date: March 24, 2014 at 5:34:42 AM GMT+5:30
To: Paquin Normand <paquin@illinois.edu>

Cc: Frerichs Laura <lfrerich@illinois.edu>

Subject: Box and Umbach

Normand,

It would be important for you to allow Paul to have access to the COM box as a reader and contributor /editor. The sooner you can do this the better so that he can write the feasibility report with the maximum amount of information.

Sent from my iPhone

Message

From: Phyllis Wise [REDACTED]
Sent: 3/25/2014 8:26:01 PM
To: Frerichs Laura [REDACTED]; Adesida Ilesanmi [REDACTED] Umbach Paul [PUMBACH@TRIPPUMBACH.COM]
Subject: Re: Incoming UIC College of Medicine at Urbana Regional Dean

Dear Laura,

I am forwarding Normand's email to you so that you can send it to his personal email. Please do not send it to his Illinois email. I am copying Ade at his [REDACTED] address and Paul Umbach.

I agree with some of Jim's comments and suggestions. I will be meeting with the new dean and I will alert her to the Tripp Umbach report. I don't know how much more we need to say. Dimitri hired her and he was interviewed by tarpaulin so he should feel a responsibility to her. Her appointment is in the UIC COM. She may have a 0%appt in MCB, but I am not sure of that.

Relative to Jim's comments about saying positive things about the current COM, we have to keep in mind that Bob (and others, including Pam Strobel) have said that we have to PROVE that the current organizational structure does not work, or our new COM is a non-starter. Bob has proposed an organizational structure where all campus COMS (Chicago, Urbana, Rockford, and Peoria) are co-equal and overseen by a super dean who will mediate all discussions relative to admissions, recruitment etc. we would all continue to be under a single accreditation.

If pointing out the good things about the current structure compromises our ability to demonstrate the critical need to establish our own COM under the proposed 501c3 structure, I am not for pointing out the positives too much.

Thanks for conveying this to Normand.

Phyllis

Sent from my iPad

On Mar 26, 2014, at 1:07 AM, "Paquin, Normand" <paquin@illinois.edu> wrote:
Phyllis,

I was just speaking via Lync to Jim Slauch on a number of matters related to the project and FAQs we are developing.

He reminded me about his concern that the incoming Regional Dean be sufficiently informed about developments so as to not feel totally blindsided. He knew that you had already hinted about this to her during the interview process. Am I right in thinking that you were going to have occasion to meet with her one-on-one? Let me know if you have plans related to this.

Jim also raised some good points. He said we need to consider putting a very positive spin in our FAQs on the fact there is an existing College of Medicine here with a group of very dedicated and experienced people to build off from. It is a story that is similar to other recent branch campuses that have spun off to become independent.

I hope the trip to India is productive.

Normand

Normand Paquin, Ph.D., MBA
Illinois Applied Research Institute
2100 S. Oak St.
Suite 206, MC628
Champaign, IL 61820-0910

email: paquin@illinois.edu

work: 217-244-6813

cel: [REDACTED]

fax: 217-244-2705

From: Phyllis Wise [REDACTED]
Sent: Friday, March 28, 2014 8:53 PM
To: Mike DeLorenzo
Subject: Re: COM - Mike D.

BTW I have not told many people about the email from CK to Bob since I thought that this should be kept to ourselves. I did tell Ed McM to seek his advice. He was pretty shocked and told me that I report to Bob and not to the BOT. I told him that I knew Bob wanted to please CK and I did not want to put him into a tough spot. I suspect he might tell Tim about this. I told Peter Fox (he laughed) and Devon Bruce (he gave me an earful about how no one respects CK) since they were supposed to contact the governor and I told them to hold off. I told Jennifer W because she was meeting with other people during this last week and I wanted her to know that we had to be careful. I did NOT say anything to Jim or the rest of the external advisory committee (other than Peter, because I don't want him to be intimated by the politics of all of this.

Sent from my iPad

> On Mar 29, 2014, at 2:19 AM, Phyllis Wise [REDACTED] wrote:

>
> Mike,
>
> Thanks so much for telling Robin bout the exchange between CK and RAE. You are absolutely right that we have to just acknowledge the report for now and continue to be aware of possible negative repercussions if we do anything more. Using the BCD report as the precedence of how to handle this is an excellent strategy. There are so many steps to go yet that we don't want to make mistakes now.
>
> I do not know whether Paul has made contact with Chris yet. But the fact that he has not contacted me makes me believe that he has not.
>
> Parenthetically, Rick Stephens had an initial conversation with [REDACTED] and he told him that he and [REDACTED] are not interested in investing in the COM or anything else at the university. Please do NOT spread this news since [REDACTED] agreed to have breakfast with Rick during the week of April 7, so I still have hope that the door is not completely closed. Rick believes (and I agree) that the [REDACTED] has had a permanent negative effect on his view of the university. I think there is still need to continue to get advice from [REDACTED] in the COM and other university issues, it will be more difficult [REDACTED]
>
> Thanks for getting this back on track and not allowing this to get out of hand.

>
> Phyllis

>
> Sent from my iPad

>
>> On Mar 28, 2014, at 7:14 PM, Mike DeLorenzo [REDACTED] > wrote:

>>
>> Phyllis,
>>
>> MIke DeLorenzo here on my [REDACTED] account. At our COM meeting today Robin laid out an aggressive media blitz on April 7th around the Umbach report release which included you and Jim L. giving interviews to the Tribune etc.
>>

>> I had a private discussion with Robin, Normand and Jennifer W, after the meeting and told them about the push back from the Chairman (I know you had talked with Jennifer already) following our meeting with Cullerton.

>>

>> We all agreed that we need to scale the media piece back where we acknowledge the Umbach report and that we are reviewing the report. I am concerned if you there are interviews especially in Chicago it may be interpreted that the COM is a forgone conclusion, especially since we just received the report and there will be further negative pushback. I think we treat it similar to the BCD report where we acknowledge it is a feasibility study and we are reviewing the report.

>>

>> Let me know if you agree with this strategy. Also do you know if Paul spoke with the Chairman yet?

>>

>> Mike

Message

From: Ilesanmi Adesida [REDACTED]
Sent: 3/30/2014 4:43:22 PM
To: Phyllis Wise [REDACTED]
Subject: Re: One additional comment

Phyllis,

Thanks. It is really great that Paul is taking this project so seriously and personal. Great indeed.

Ade

On Sun, Mar 30, 2014 at 3:35 PM, Phyllis Wise [REDACTED] wrote:

Ade,

I want you to know about this added exchange about the next steps to the Umbach report.

Phyllis

Sent from my iPad

Begin forwarded message:

From: Phyllis Wise [REDACTED]
Date: March 30, 2014 at 9:28:41 PM GMT+1
To: Paul Umbach <PUmbach@trippumbach.com>
Subject: Re: One additional comment

Wonderful, Paul. Let me figure out how to work with Tim Koritz, who heads the Health Committee to get you to present to his committee and/or the entire board. Obviously, from my perspective it should be the entire board since that is the way everyone will be there with Chris there. I will wait until after you make the presentations on April 7-8. Tim will be on the phone on April 7. Interestingly enough our July Board meeting is supposed to be a retreat to discuss the governance structure of the university writ large, in preparation for the next president. Our project fits into the category of governance. Let's think about this together.

Phyllis

Sent from my iPad

On Mar 30, 2014, at 9:20 PM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Thank you very much. Honestly, I do need to make the presentation of my findings to your board. I have used this opportunity (board presentations) on so many occasions to turn ideas into action. However, it will need to be a team effort -- me presenting my findings and answering the HARD questions -- you advocating for how this plan helps your university and the state for the next 50 years - and the board members looking deep in the hearts to stand up for what is the right thing. Up and down votes are very American. I will be there for you and we will win together. You, me and the board members who want a stronger university and state. There is no way we can lose. Count me in for the presentation -- I don't want you to do it alone. :)

Paul O. Umbach

Founder and President

Tripp Umbach

2359 Railroad St. #3701

Pittsburgh, PA 15222

Corporate Headquarters: [412.281.2313](tel:412.281.2313)

Cell Number: [REDACTED]

Fax Number: [412.281.9946](tel:412.281.9946)

www.trippumbach.com

“Turning ideas into action for 25 years”

-----Original Message-----

From: Phyllis Wise [[mailto:\[REDACTED\]](mailto:[REDACTED])]

Sent: Sunday, March 30, 2014 3:55 PM

To: Paul Umbach

Subject: One additional comment

Paul,

I wanted to add one more comment on your email to all of us, but did not want to email everyone from my Illinois.edu address.

Thank you very much for being willing to change your schedule around to able to be at the Carle meeting in person. I am sure it will make a significant difference. You probably know that I will be making a short presentation as well. I will want to cord innate my presentation with yours.

Would you please also consider whether you think a presentation by you to our Board of Trustees would be helpful. We don't have to decide this right now but I hope you will keep this in mind as we go on to the next steps. I assume you have spoken with Tim Koritz and Ed McMillan (he emailed me that he had a great conversation with you). I am not sure whether you have been successful in reaching Chris Kennedy. I worry

about Chris' desire to kill this and believe that if you gave a presentation, the other members of the board would be willing to stand up and go against his attempt to kill this.

Thank you again for everything that you are doing. When we asked you to take this on, I never imagined that you would personally devote so much time on our project. It has come so far from our original thinking of combining Peoria and us. From everything I know about how the report will unfold, it is a much stronger model and justifiable against the political winds we face.

Warm wishes,

Phyllis

Sent from my iPad

Message

From: Phyllis Wise [REDACTED]
Sent: 4/1/2014 8:48:21 PM
To: Mike [REDACTED] g...@[REDACTED]
Subject: Re: COM - Mike D.

That will be fine. I will talk with Ade when we are traveling back to champaign in a few hours, just to confirm that he and I are on the same page.

Sent from my iPad

On Apr 2, 2014, at 1:56 AM, Mike <[REDACTED]> wrote:

Sounds good. I think Robin, Normand and I are trying to get a brief meeting with you at the Beckman cafeteria at 7:30am Thursday morning before your 8am meeting there to go over this with you. Just so we are all on the same page.

On Apr 1, 2014, at 5:46 PM, Phyllis Wise [REDACTED] m> wrote:

Mike, I completely agree with you. I have been communicating with Paul Umbach thru my [REDACTED] account. I think he has things under control that is he is bringing CK into the early version of the executive summary. If CK explodes, I am sure that he will tell me and we can make a last minute correction. But as of now, we have to go ahead and publicize the report at the SEC and the TH. Anything else would be wrong and, as you said, make Carle wonder about our resolve.

Phyllis

Sent from my iPad

On Apr 1, 2014, at 4:48 PM, Mike DeLorenzo <[REDACTED]> wrote:

Phyllis,

Robin has suggested with the additional scrutiny from CK that maybe you should hold off in speaking about the Umbach report at the Senate Exec committee as well as the town hall, because the press will be there. I think we have come too far too hold off, I think you should acknowledge the study in both cases and discuss it briefly. My concern is if we backtrack too much it will look like there is a problem, especially to Carle. However, to be safe you might want to have a conversation with Bob to get clarity on what you can say and not say.

Mike

On Sat, Mar 29, 2014 at 1:38 AM, Phyllis Wise [REDACTED] m> wrote:

Thanks again for letting folks know.

Sent from my iPad

On Mar 29, 2014, at 3:44 AM, Mike DeLorenzo <[REDACTED]> wrote:

We had a good meeting today and the team (including the Carle reps) are still pushing forward. That is a shame about [REDACTED]. Hopefully at some point [REDACTED] will get back involved with the campus.

Also I did not tell the Carle folks about the CK exchange, I waited until they left. I did want Robin and Normand to know so they did not get too far out in front with the press on the announcement.
Mike

On Mar 28, 2014 8:19 PM, "Phyllis Wise" <[REDACTED]@m> wrote:
Mike,

Thanks so much for telling Robin bout the exchange between CK and RAE. You are absolutely right that we have to just acknowledge the report for now and continue to be aware of possible negative repercussions if we do anything more. Using the BCD report as the precedence of how to handle this is an excellent strategy. There are so many steps to go yet that we don't want to make mistakes now.

I do not know whether Paul has made contact with Chris yet. But the fact that he has not contacted me makes me believe that he has not.

Parenthetically, Rick Stephens had an initial conversation with [REDACTED] and he told him that he and [REDACTED] are not interested in investing in the COM or anything else at the university. Please do NOT spread this news since [REDACTED] agreed to have breakfast with Rick during the week of April 7, so I still have hope that the door is not completely closed. Rick believes (and I agree) that [REDACTED] has had a permanent negative effect on his view of the university. I think there is still need to continue to get advice from [REDACTED] on the COM and other university issues, it will be more difficult. [REDACTED]

Thanks for getting this back on track and not allowing this to get out of hand.

Phyllis

Sent from my iPad

> On Mar 28, 2014, at 7:14 PM, Mike DeLorenzo <[REDACTED]> wrote:
>
> Phyllis,
>
> Mike DeLorenzo here on my [REDACTED] account. At our COM meeting today Robin laid out an aggressive media blitz on April 7th around the Umbach report release which included you and Jim L. giving interviews to the Tribune etc.
>
> I had a private discussion with Robin, Normand and Jennifer W, after the meeting and told them about the push back from the Chairman (I know you had talked with Jennifer already) following our meeting with Cullerton.
>
> We all agreed that we need to scale the media piece back where we acknowledge the Umbach report and that we are reviewing the report. I am concerned if you there are interviews especially in Chicago it may be interpreted that the COM is a forgone conclusion, especially since we just received the report and there will be further negative pushback. I think we treat it similar to the BCD report where we acknowledge it is a feasibility study and we are reviewing the report.
>
> Let me know if you agree with this strategy. Also do you know if Paul spoke with the Chairman yet?
>
> Mike

From: Phyllis Wise [REDACTED]
Sent: Thursday, April 03, 2014 11:43 AM
To: Paquin, Normand
Cc: DeLorenzo, Michael T; Frerichs, Laura Appenzeller
Subject: Re: Structure

I would check with Jim about how much he has actually said. I think the less precise we are, the better.

Sent from my iPad

On Apr 3, 2014, at 8:36 AM, "Paquin, Normand" <paquin@illinois.edu> wrote:

Phyllis,

It strikes me that 501c3 concept has already been presented by Jim to his board. Rather than remove it completely, would it make sense to say 501c3 or a similar entity allowing for an equal partnership?

Normand

Message

From: [REDACTED]
Sent: 4/4/2014 2:15:33 PM
To: Phyllis Wise [REDACTED]
Subject: Re: timing

Hi Phyllis:

what we'll have to release is still being determined. He's asked for quite a bit -- all directed by Andrew Scheinman. No matter what, we won't have to give him anything until the 18th at the earliest. If we can release to our stakeholders on the 14th, that would solve this issue.

Do you need to meet with Bob/Chris before the 14th?

Thanks!
r

----- Original Message -----

From: "Phyllis Wise" <[REDACTED]>
To: [REDACTED]
Cc: [REDACTED]
Sent: Friday, April 4, 2014 1:48:19 PM GMT -06:00 US/Canada Central
Subject: Re: timing

What do we have to send? Do we have to submit the draft that we have been revising? Do we have to submit our responses?

I think we will have a draft that we will be willing to post. There is an academic senate meeting on April 14. That may be the date of the first announcement.

The Carle meeting is also on april14, don't know when.
Sent from my iPad

> On Apr 4, 2014, at 2:41 PM, [REDACTED] wrote:
>
> Hi Phyllis and Mike:
>
> I just wanted to alert you that the FOIAs we've received about the CoM likely will be due to the requesters on about April 18. Since the DI is one of the requesters, we need to be ready to distribute the massmail to Carle and our employees by then, so the DI doesn't scoop us on our own initiative.
>
> Just something to think about for hard release deadlines...
> r
>
>
>
>
>

From: Phyllis Wise [REDACTED]
Sent: Friday, April 04, 2014 4:44 PM
To: [REDACTED]
Subject: Re: timing

I hope that we will have an idea of when we will get a report after our Monday and Tuesday meetings. Paul and I will decide on how to inform Bob and Chris. We need to do them, Ed McM, Tim K, Tom F before it goes out.

The faculty leaders that we met with asked for an FAQ to use to help to explain all of this to faculty. We need to complete that.

Sent from my iPad

> On Apr 4, 2014, at 4:21 PM, [REDACTED] wrote:
>
> Don't you need to have met with Bob and Chris before media start doing stories? I just don't want to get out ahead of UA and cause challenges for you.
>
>
>
>
>
>
>
> ----- Original Message -----
> From: "Phyllis M Wise" [REDACTED]
> To: [REDACTED]
> Cc: [REDACTED]
> Sent: Friday, April 4, 2014 2:36:11 PM GMT -06:00 US/Canada Central
> Subject: Re: timing
>
> I don't understand your email.
>
> Sent from my iPhone
>
>> On Apr 4, 2014, at 2:42 PM, [REDACTED] wrote:
>>
>> Also for scheduling that meeting with Bob and the Chair.
>>
>>
>>
>>
>>
>>
>> ----- Original Message -----
>> From: [REDACTED]
>> To: "Phyllis Wise" [REDACTED]
>> Sent: Friday, April 4, 2014 1:41:51 PM GMT -06:00 US/Canada Central
>> Subject: timing
>>

>> Hi Phyllis and Mike:

>>

>> I just wanted to alert you that the FOIAs we've received about the CoM likely will be due to the requesters on about April 18. Since the DI is one of the requesters, we need to be ready to distribute the massmail to Carle and our employees by then, so the DI doesn't scoop us on our own initiative.

>>

>> Just something to think about for hard release deadlines...

>> r

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>>

>>

From: Phyllis Wise [REDACTED]
Sent: Friday, April 04, 2014 10:00 PM
To: Paul Umbach
Cc: Ha Pham; Beth Paul; Lisa Oldham
Subject: Re: Inquiry and update on Monday and Tuesday program

All great news. Thanks so much as always!

Sent from my iPad

On Apr 4, 2014, at 3:45 PM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Hi Phyllis, sorry for so many emails. As you can see, we will have two VERY busy days on Monday and Tuesday. The report and PowerPoint will be excellent documents after they reflect the input of everyone involved. I circulated your most recent L O N G email to me to my teammates Ha and Beth so the we can use it as a final check list before finalizing the report. Thanks for sending your thoughts last night – I want you to know that we are in complete agreement with you on everything you mentioned and in fact, have been working to address your input in the draft for Monday.

In other news, the project is clearly transitioning from “Feasibility Study Report” – our current deliverable to Business planning and Implementation assistance. The meetings on tap for Tuesday (see attached preliminary schedule) are focused on post-feasibility services. So, I will try this weekend to get you a contract extension document that you and Jim can review to cover our consultation from Tuesday moving forward.

I hope you have a great weekend as I look forward to meeting with you and the team on Monday.

Take care.

Paul

Paul O. Umbach
Founder and President
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2359 Railroad St. #3701
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Corporate Headquarters: 412.281.2313
Cell Number: [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

“Turning ideas into action for 25 years”

From: Paquin, Normand [<mailto:paquin@illinois.edu>]
Sent: Friday, April 04, 2014 5:36 PM
To: Paul Umbach
Cc: Ha Pham; Beth Paul; Frerichs, Laura Appenzeller; Mike.Billimack; Stephanie.Beever
Subject: Inquiry and update on Monday and Tuesday program

Paul,

Carle and UI have prepared what we believe will be a very productive program to help make the feasibility report as good as it can be.

First, a question: a few members of Carle and I are available on Monday morning to help you with final edits of the PowerPoint presentation on the morning of the 7th. Would you be interested in having us work with you that morning or do you think you will need the time to work on your own? We will certainly want to have the presentation ready early enough for us to print copies ahead of the noon meeting and we will assist in getting that done for you.

We have Room 125 Coble Hall reserved from 9:30 AM to noon on April 7th. We could meet you there at 9:30 or later if it makes sense. Just let us know.

For the rest of the days, here is what we have planned. I hope you'll agree with us that this could be a most productive program. Please also feel free to inject ideas and thoughts.

After your noon to 2 PM presentation (in Room 300 of Harker Hall), a session from 2:00 to 3:30 PM to educate the partners on their mutual perspectives and capabilities. This might be more of an informative session for you but you should inject ideas and push us when needed. Topics to be covered are:

Why is Carle a good partner for this COM? (Carle to lead)

What sets UI at Urbana-Champaign apart as a unique entity to move forward with a COM (UI to lead)

What is in it for Carle? (Carle to lead)

What is in it for the University of Illinois at Urbana-Champaign? (UI to lead)

The rest of the day is for reading the new draft. You will have a dinner with the leaders of Carle and UI that evening.

On Tuesday, we have four sessions planned following the External Economic Development advisory group meeting. For each of these, we have a smaller group meeting. The sessions are meant to help finalize the report and are based on the assumption that we will have benefited from your presentation the previous day and will have had a chance to review the latest draft. We are in the middle of scheduling these so they may occur in a slightly different order than listed here.

A session on goals: it will be focused on insuring the goals needed to be emphasized of the new COM are clearly delineated early in the final document to set the stage for the rest.

Another session on the partnership: it will be focused on insuring the feasibility report has the content needed to clearly demonstrate why Carle and UIUC from an ideal partnership to advance the goals of this new COM

A third session will be on budget and structure: it will be focused on agreeing on the budget components that must be included in the feasibility report versus what can be put off for further discussion in the business plan phase. We will also discuss aspects of some partnership structures if time allows.

A fourth session will be on the transition from the current COM to the new COM: it will be focused on ensuring the feasibility report says what is needed to say about the transition and what will need to be considered for future consideration. This is expected to include the status of M1 education, the PhD/MD scholars program, and other topics identified during the discussion.

We look forward to seeing you on Monday!

Normand

From: Phyllis Wise [REDACTED]
Sent: Sunday, April 06, 2014 3:27 PM
To: Paul Umbach
Subject: Re: follow-up from Paul

I'm running too...let me check on Bob's availability tomorrow. I have a meeting at 8, but we could get coffee at the corner Espresso Royale (and a scone or something at 7, if that is not crazy early for you).

Sent from my iPad

On Apr 6, 2014, at 2:33 PM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Dear Phyllis – my work time is very limited today as I must take a cab soon to the airport, so here are few quick notes – so don't read this email as me being less personal:

- YES!! I want to meet with Bob on this trip – I am on campus all day on Monday and Tuesday and would be flexible – best if we both meet with him.
- Very soon you and the team will receive all three of our work products – 1) full report with all input received (some of it within the last five minutes as everyone on both of our teams is obsessed), 2) A 20 page executive summary and 3) a Draft PowerPoint.
- Once you receive these documents, you can certainly forward them to Bob (hold up on Chris of course).

I will be in town very late tonight and look forward to seeing you sometime tomorrow. I am available for breakfast if you are available to meet – I'm at the Country Inn and Suites where they have a nice Waffle Machine. Thanks again.

Paul

Paul O. Umbach
Founder and President

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Cell Number: [REDACTED]
Fax Number: 412.281.9946
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"Turning ideas into action for 25 years"

From: Wise, Phyllis M [<mailto:pmwise@illinois.edu>]
Sent: Sunday, April 06, 2014 11:20 AM
To: Paul Umbach
Subject: RE: follow-up

Paul,

I promised Bob that you would follow up with him to tell him about the progress and your conclusions to date. I suspect that you think that it is not the right time this week – though I might be wrong. I would love to be with you when you meet with him, if you think this is advisable. We can talk more about this during your visit.

I look forward to seeing you tomorrow!

Best wishes,
Phyllis

From: Paul Umbach [mailto:PUmbach@trippumbach.com]
Sent: Sunday, April 06, 2014 9:44 AM
To: Wise, Phyllis M
Subject: RE: follow-up

Thanks very much for your leadership! ☺

Paul O. Umbach
Founder and President

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Corporate Headquarters: 412.281.2313
Cell Number: [REDACTED]
Fax Number: 412.281.9946
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"Turning ideas into action for 25 years"

From: Wise, Phyllis M [mailto:pmwise@illinois.edu]
Sent: Sunday, April 06, 2014 9:38 AM
To: Khanna, Pradeep K; Adesida, Ilesanmi; DeLorenzo, Michael T; Frerichs, Laura Appenzeller; Paquin, Normand; Peterson, Dan C
Cc: Paul Umbach; Jim Leonard (James.Leonard@Carle.com); Farrell, Thomas J
Subject: follow-up

All,

I had made a mistake in the cost of the next phase of the Tripp Umbach feasibility study in my email to Bob. I wrote him a second email and he continues to approve of going ahead.

Phyllis

From: Paul Umbach <PUmbach@trippumbach.com>
Sent: Monday, April 07, 2014 3:32 PM
To: [REDACTED] Laura Frerichs ([REDACTED]); Adesida, Ilesanmi (iadesida@illinois.edu); Normand Paquin [REDACTED]; Kaler, Robin Neal (rkaler@illinois.edu); DeLorenzo, Michael T (michaeld@illinois.edu); Stephanie.Beever (Stephanie.Beever@carle.com); Mike.Billimack (Mike.Billimack@carle.com); Jennifer.Hendricks-Kaufmann (Jennifer.Hendricks-Kaufmann@carle.com); Eardley, Jennifer J (jeardley@illinois.edu); Bill Strong (bill@bstrongcommunications.com); James.Leonard@Carle.com
Subject: You are the new Super Cheetah Medical School!!
Attachments: Paul_Umbach_Presentation_Tradeline_Dino_to_Cheetah.pptx
Importance: High

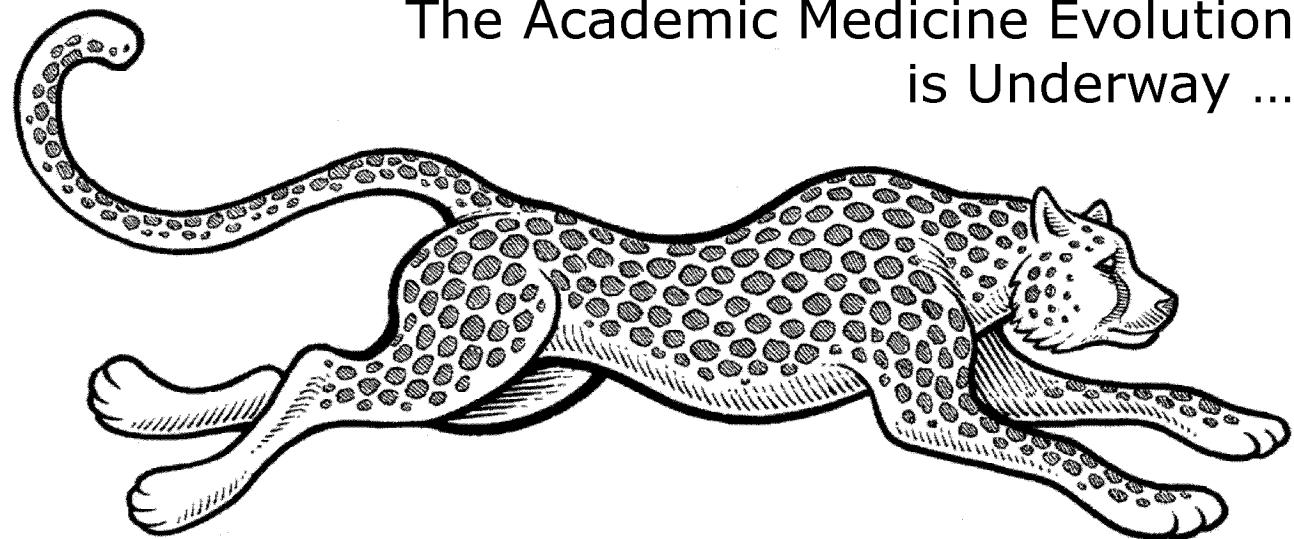
Fun day today! Thanks for all of your help team!

Paul O. Umbach
Founder and President
Tripp Umbach
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Corporate Headquarters: 412.281.2313
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“Turning ideas into action for 25 years”

Moving from dinosaur to cheetah...

The Academic Medicine Evolution
is Underway ...



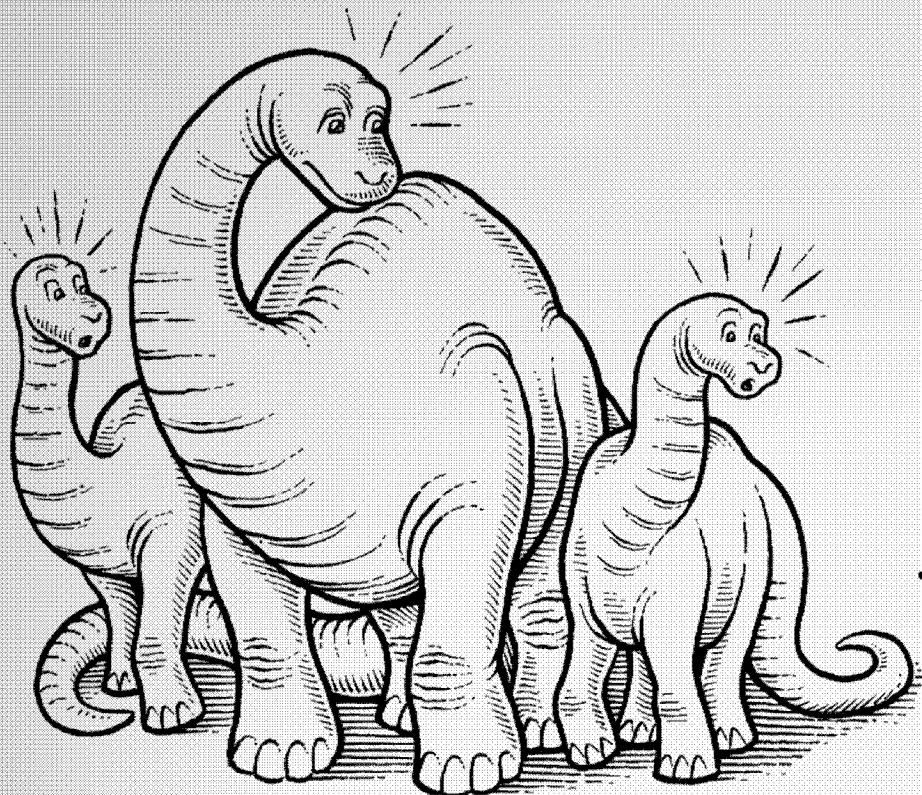


A 20-minute journey into the Future ...

“In the long history of humankind (and animal kind, too) those who learned to collaborate and improvise most effectively have prevailed.”

– Charles Darwin

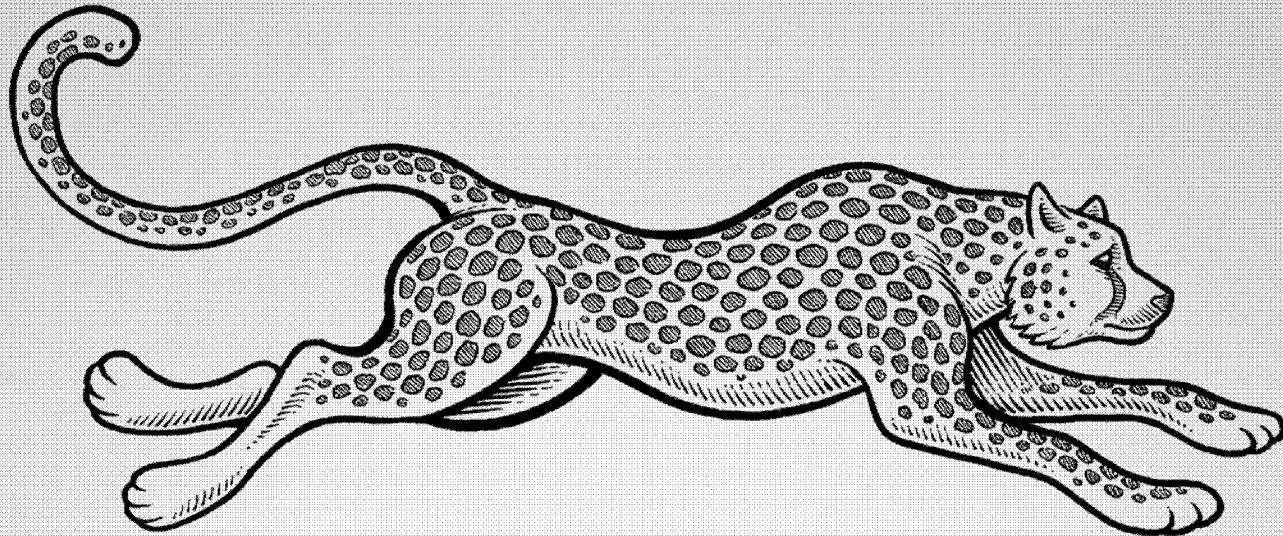
**Strong community health systems push
dinosaurs to evolve...**



...the shake up in Phoenix.

Academic Medicine in Partnership

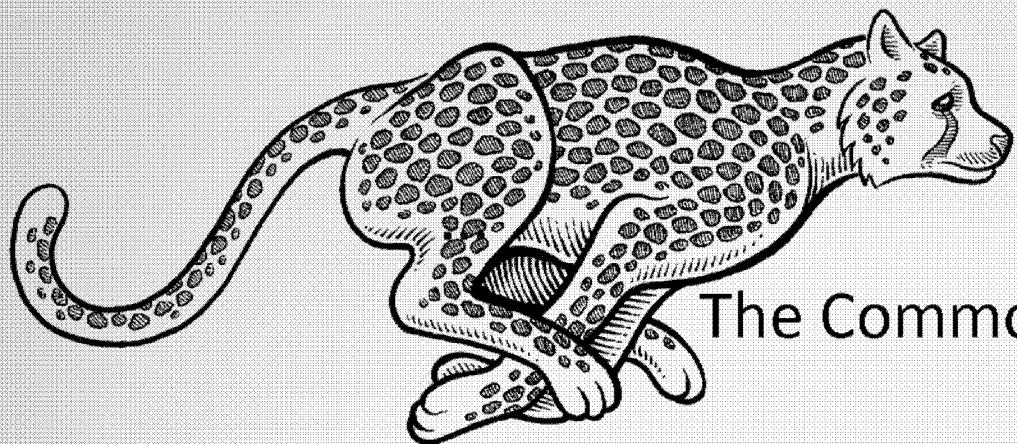
The Evolution of the “Superhospital”



...the rise of the “Superhospital” with a new appetite for education and research.

Further Faster Stronger

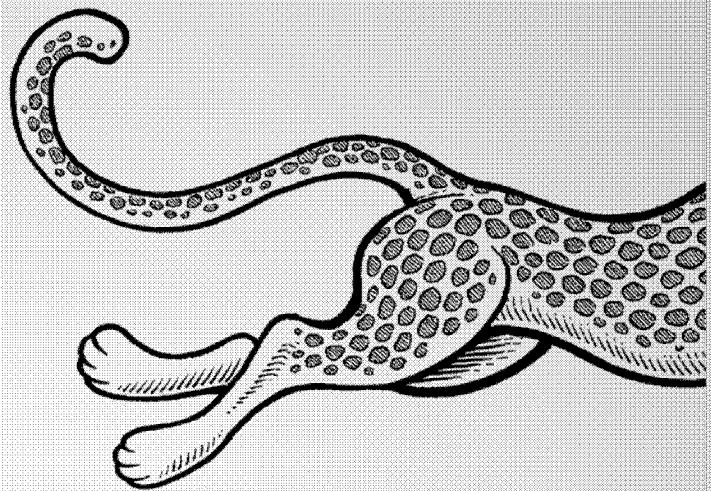
New Sources of money contributes to...



The Commonwealth Medical College

New Partners – New Money

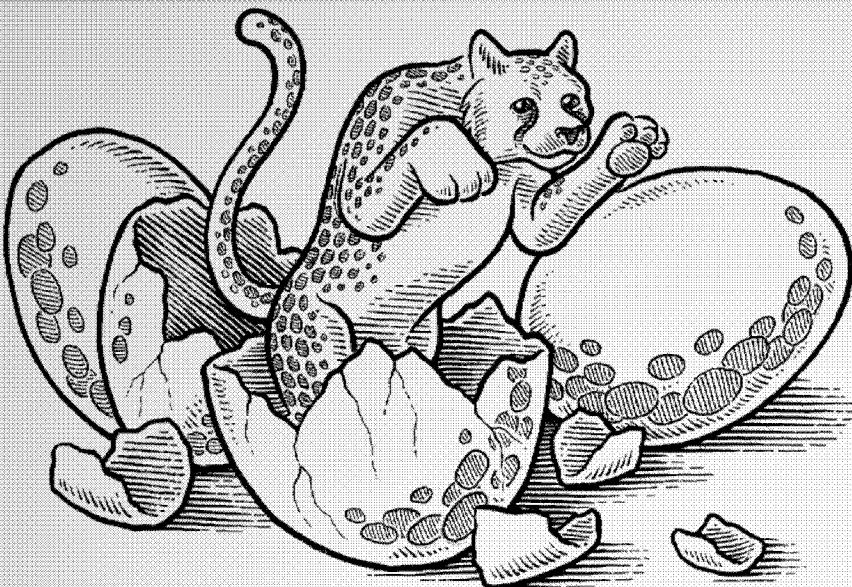
Embracing inter-professional education ...



...same great taste, but less filling.

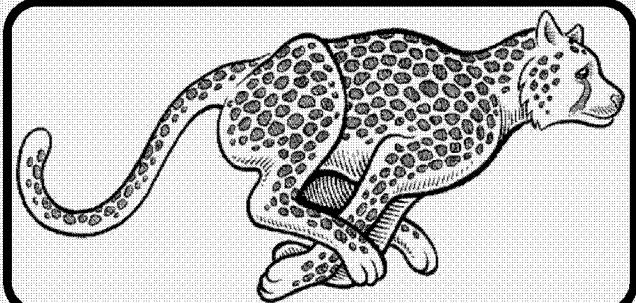
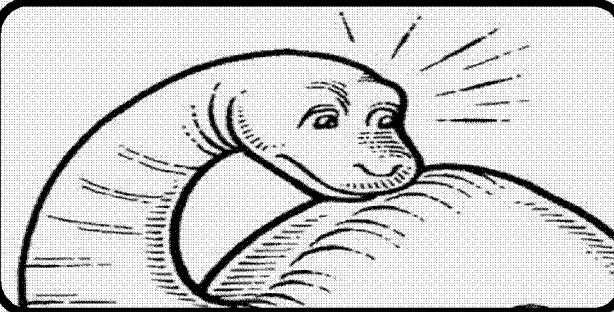
**The Lean Academic Medical
Campus of the Future**

The Community Health Medical School



Learning from a new
medical school

Florida International

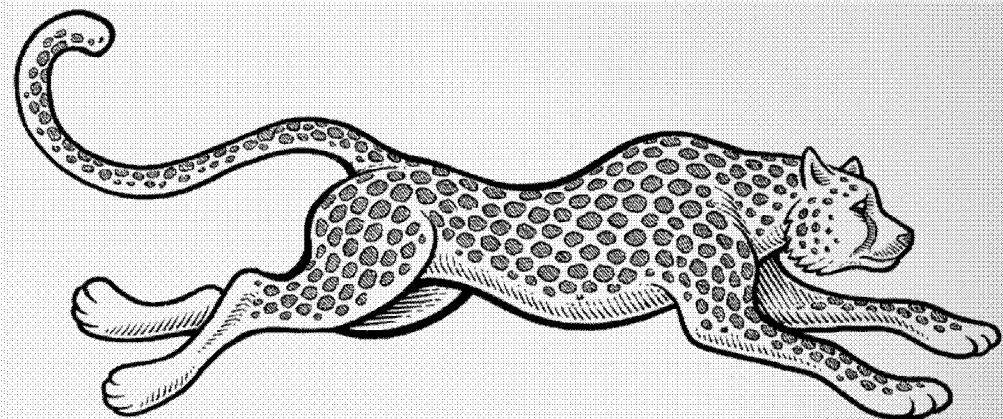


- ➡ *Fight for closed models*
- ➡ *Rely on “prehistoric” funding sources*
- ➡ *View all others as competition*
- ➡ *Keep programs in separate facilities*

- ➡ *Adjust quickly to new funding environment*
- ➡ *Make fast decisions*
- ➡ *Conserve energy*
- ➡ *Operate efficiently*
- ➡ *Close the deal*

You Know You Are A....?

- Leverage the strengths of current and potential partners.
- Explore every opportunity to grow revenue and limit long term exposure.
- Maximize the impact of facilities across various disciplines



Key Learning ...



TrippUmbach

research • strategy • impact

412.281.2313

429 First Avenue Pittsburgh, PA 15209

*For more information please visit our website at
www.trippumbach.com*

Illustrations by Mario Zucca

From: Phyllis M Wise [REDACTED]
Sent: Tuesday, April 08, 2014 8:28 PM
To: Umbach Paul
Subject: THANK YOU!!!!

Dear Paul,

In the rush at the end of our external advisory board meeting, I did not take the time to thank you adequately for EVERYTHING that you did over the past two and a half very intense days. I don't know how you keep this level of energy and engagement. Both of the meetings and the dinner were so useful and you incorporated all of our thinking as we went along, I know you will be doing another revision and we will have one last chance to have input before we put this report to bed, and start the next chapter.

I look forward to next week when I'll see you at the Carle Board meeting. I hope I'll know more about Bob and the BOT committee meeting by then.

All the best and with deep gratitude and respect, Phyllis

PS do you have a copy of the PPT you used at today's meeting?

Sent from my iPhone

From: Paul Umbach <PUmbach@trippumbach.com>
Sent: Thursday, April 10, 2014 12:19 AM
To: Normand Paquin [REDACTED]; Stephanie.Beever
(Stephanie.Beever@carle.com)
Cc: Ha Pham; Beth Paul; [REDACTED]
Subject: Here is the LATE night version of the report with all changes to date -- now called Final Draft Report
Attachments: Final Darft of the Carle and IU College of Medicine Feasibility Study from Tripp Umbach (April 9 OVERNIGHT).docx
Importance: High

Dear Normand and Stephanie:

Thanks for all of your hard work today (and for the past month or so) – the report now has the changes you both provided today. Special thanks also to Ha for her hard work today on the changes before passing it to me.

The game plan for tomorrow (today) is to send it out to the team and get their FINAL input – as on Friday afternoon we are holding a Web-EX session to go line by line with the last touches.

I copied my friend Phyllis on this email as she likes to follow-along and I am sure will be first to provide additional valuable input – since it is also Jim’s baby – I copied him as well – please remember Phyllis and Jim to provide your input through your teammates Normand and Stephanie so we all stay connected.

Thanks again team. It was fun to stay up with the baby this evening in Tallahassee, Florida where we are working at FSU. The “baby” goes back home to Urbana tomorrow for final review. One more time with us and its all yours on Monday morning as we discussed. Then the fun really begins!

Good night.

Paul

Paul O. Umbach
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“Turning ideas into action for 25 years”

From: Phyllis Wise [REDACTED] <[REDACTED]>
Sent: Thursday, April 10, 2014 4:22 AM
To: Wise Phyllis
Subject: Fwd: Here is the LATE night version of the report with all changes to date -- now called Final Draft Report
Attachments: Untitled attachment 07574.docx; Untitled attachment 07577.htm

Sent from my iPad

Begin forwarded message:

From: Paul Umbach <PUmbach@trippumbach.com>
Date: April 10, 2014 at 12:19:02 AM CDT
To: "Normand Paquin ([REDACTED])" <[REDACTED]>
"Stephanie.Beever (Stephanie.Beever@carle.com)" <Stephanie.Beever@carle.com>
Cc: Ha Pham <HPham@trippumbach.com>, Beth Paul <BPaul@trippumbach.com>, [REDACTED]
Subject: Here is the LATE night version of the report with all changes to date -- now called Final Draft Report

Dear Normand and Stephanie:

Thanks for all of your hard work today (and for the past month or so) – the report now has the changes you both provided today. Special thanks also to Ha for her hard work today on the changes before passing it to me.

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"Turning ideas into action for 25 years"

From: Normand Paquin [REDACTED]
Sent: Thursday, April 10, 2014 6:12 AM
To: Phyllis Wise
Cc: Paul Umbach; Stephanie.Beever (Stephanie.Beever@carle.com); Ha Pham; Beth Paul
Subject: Re: Here is the LATE night version of the report with all changes to date -- now called Final Draft Report

Thank you Paul, Ha, and Beth,

Fantastic that you got this to us this morning despite us getting our comments to you only in the late afternoon. Just about to circulate. I look forward to seeing talking to you tomorrow afternoon.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Thu, Apr 10, 2014 at 4:07 AM, Phyllis Wise [REDACTED] > wrote:
I'll look at this today. Am on my way in a couple of hours to Springfield to urge the legislature not to cut our funding...

Sent from my iPad

On Apr 10, 2014, at 12:19 AM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Dear Normand and Stephanie:

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"Turning ideas into action for 25 years"

<Final Darft of the Carle and IU College of Medicine Feasibility Study from Tripp Umbach (April 9 OVERNIGHT).docx>

From: Phyllis Wise [REDACTED]
Sent: Saturday, April 12, 2014 9:13 PM
To: Ilesanmi Adesida
Subject: Re: thanks for your last email

Ade,

I agree on all points! I hope that Normand makes the point about the names. I will talk with Jim about coming out strongly with a commitment so that we can go to other donors. I will work on Bob and on Pam and Pat.

Phyllis

On Saturday, April 12, 2014 5:45 PM, Ilesanmi Adesida <[REDACTED]> wrote:
Phyllis,

Thanks. This is comprehensive; I hope that he gets what we want. And I hope he will actually list the names of all the people he talked to in an appendix so nobody can deny being spoken to! I just hope that Bob can become an advocate and don't stay so neutral. He can advocate and still make the case for UIC Med School to remain strong.

Carle's commitment is very important in this enterprise. I just wish that they could come out at some point very soon and talk about \$100M initial commitment where some of the fund is actual cash which can be used for start-up for clinical folks and an initial operating fund. Then add to that recurring budget from their practice. Well, may be this could come after we do the Business and Financial Plan.

We need Pam Strobel and Pat Fitzgerald in our corner given that Ed Mcmillan and Tim Koritz get it already.

Ade

On Sat, Apr 12, 2014 at 9:28 AM, Phyllis M Wise <[REDACTED]> wrote:
Here you go.

Sent from my iPhone

Begin forwarded message:

From: Paul Umbach <PUmbach@trippumbach.com>
Date: April 12, 2014 at 8:41:55 AM CDT
To: 'Phyllis Wise' <[REDACTED]>
Subject: RE: thanks for your last email

Great! You are so efficient – you wrote me an encouraging note AND provided the roadmap for next week in one email. Thanks! Paul

P.S. I look forward to seeing you on Tuesday at Carle. ☺

Paul O. Umbach

Founder and President

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Cell Number: [REDACTED]
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"Turning ideas into action for 25 years"

From: Phyllis Wise [[mailto:\[REDACTED\]](#)]
Sent: Saturday, April 12, 2014 7:12 AM
To: Paul Umbach
Subject: thanks for your last email

Dear Paul,

I can only imagine how bone tired you must be dealing with all of us. On our side, we (the university and Carle) are learning about ourselves and each other. This has taken some time and we learn more with each version of the report. You are teaching us the difference between a feasibility report and an advocacy report. I think it is more clear to all of us, including me, after our conversations yesterday. I think we all realize more and more just how important this report will be, how it will be interpreted, how it will be used as the foundational piece that will either justify our going forward and actually establishing a college of medicine or will be dismissed as just a report that can be put on the shelf.

The reason that we had hoped that the economic impact of the college on our region, Chicago, and the state could be stronger is that the economic impact forms one of the reasons that justifies the amount of money that we will need, the amount of time that we will have to put into this, the required change in the way we do business.

As we all realized the difference between a feasibility report and a compelling vision statement, one where you would be willing to advocate that your findings formed a strong statement on why we must do this, we realized how important Jim and my "cover letter" has to be.

Given that our plan is to release the report on April 18, my timetable is:

April 14 or 15 (when we are absolutely sure of the release date): alert Bob Easter that the report is coming and ask him to send it to the Board of Trustees.

April 15: make presentation with you to Carle Board

April 17: send the report to Bob; assuming that he has told me that he will send it to the Board, I will copy Susan Kies, the secretary of the board, so that it can be sent to the Board

April 18: meet with Bob (with you and possibly Jim either over the phone)

April 18: write to Chris Kennedy (copy Bob) saying that "you asked to meet to talk with Bob and me. I am happy to contact Ike (his assistant), Vicki (Bob's assistant) and Phyllis

(my assistant) to arrange that meeting. Also tell him that I knew that Paul and you had not been able to contact each other. I would be happy to help the two of you to make contact"

April 18: contact Tim Koritz (and possibly Ed McMillan) to seek their help in getting me the possibility to make a presentation at the May 5 Health Sciences Committee meeting. Tim may need to help me to convince Chris Kennedy that we should not delay any presentation to the Board.

April 18: contact Pam Strobel and Pat Fitzgerald, two members of the Board who I have already met with. Both were concerned with the politics of this. Both asked me for the entire history of the College of Medicine in its present form. I will send that detailed information to them.

Anyway, thanks for being willing to continue to work with us on this really important report.

thanks, dear friend,
Phyllis

From: Phyllis Wise [REDACTED]
Sent: Monday, April 14, 2014 5:53 PM
To: Phyllis Wise
Subject: Fw: Draft Feasibility Report
Attachments: Final Draft of the Carle and IU College of Medicine Feasibility Study from Tripp Umbach April 14 v1.docx

On Monday, April 14, 2014 2:37 PM, Ha Pham <HPham@trippumbach.com> wrote:

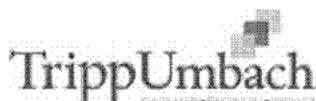
Dear Team-

Attached is our next version of the draft feasibility report. The protocol is the same as our previous reviewing structure. Please work with your report team and provide them your comments, questions, and edits. Tripp Umbach will loop back with the Urbana-Champaign team to obtain final feedback on the report. Please forward to those who I do not have on the distribution list. Thank you in advance for your assistance.

Best Regards-
Ha

Ha T. Pham

Senior Project Manager
Tripp Umbach
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www.trippumbach.com



"Turning Ideas Into Action..."



This communication contains confidential information. If you are not the intended recipient please return this email to the sender and delete it from your records.

From: Ilesanmi Adesida [REDACTED] >
Sent: Monday, April 21, 2014 7:41 AM
To: Douglas Beck
Cc: [REDACTED] Phyllis Wise
Subject: Re: Med School

Thanks, Doug. It still amazes me how people draw inferences and conclusions. Anyway, I will learn more of the art of "diplomatese" saying so much yet saying nothing!

As the Mamas and Papas of old would like to say, have a great Monday and let it be good to you!
Ade

On Mon, Apr 21, 2014 at 6:28 AM, Douglas Beck <[REDACTED]> wrote:
Hi Ade,

I was sure you had not intended anything like this. What you said, and the conclusions people jumped to are apparently quite different. IMHO, this is the sort of reaction that has to be folded into the planning; maybe the messages can be tuned a little bit to help.

Doug

On Mon, Apr 21, 2014 at 12:33 AM, Ilesanmi Adesida [REDACTED] wrote:
Doug,

I am not sure what Ron Brewer is saying at all. I don't remember saying anything like that. Even talking about the new COM was a very iffy stuff for me to even mention at that time. I told them it was something that we were thinking about. Many folks were there! I don't know the full structure of the Med School here and have not commented on it at all except for the tenure track faculty that had wanted to transfer their lines to UIUC which we have not done. So it is completely unfathomable to me what Ron is saying about APs and clinical faculty. These are all issues that have to be discussed when the time comes. Nobody is starting a med school tomorrow! We have a long way to go and we are not sure what is going to happen. The whole med school has been in an unclear state since 1972. And when i spoke with the College in my yearly rounds to different colleges, they mentioned that whatever can be done to clarify the status of the COM here would be welcome. It was on that basis that we talked to the three Neurosurgeons and persuaded them to stay after they had resolved to depart! So it is our best interest to keep anybody who knows how to run and staff a medical school! So Ron should not worry and actually not spread things that I did not say around! Others were there!

Ade

On Sat, Apr 19, 2014 at 1:38 PM, Douglas Beck <[REDACTED]> wrote:
Hi Ade,

I meant to send this email to you as well--from one of Nora's med school colleagues.

BTW, in case you missed it, one of the names that came up yesterday is partially identified in the column I sent you earlier.

Doug

D

----- Forwarded message -----

From: Phyllis Wise <[REDACTED]>

Date: Sat, Apr 19, 2014 at 12:44 PM

Subject: Re: Med School

To: Douglas Beck <[REDACTED]>

Thanks, Doug for letting me know about this. In case you want to send it to Ade, his other email address is [REDACTED]

Thanks also for your other email.

Phyllis

On Saturday, April 19, 2014 9:41 AM, Douglas Beck <[REDACTED]> wrote:

Hi Phyllis,

FYI, I thought I would pass along the following from one of Nora's colleagues, Ron Brewer who is Associate Director of Clinical Affairs (AP position). Perceptions and reality are often mixed up, don't know whether there is a message from above that could be adjusted slightly to counter some of this.

Doug

From: Brewer, Ron Wayne

Sent: Saturday, April 19, 2014 4:30 AM

To: Few, Nora J

Subject: Re: feasibilitystudy

Hi Nora:

I am not sure about much but I know that the Provost told the COM faculty that we could not be involved with the study because of conflict of interest as we are UIC employees. I spoke with a Dept. Head today that told me the report says that there would be 25 students and 12 staff members and then gave a number of full time faculty. As for job security it stands to reason that tenured faculty are secure, union employees would retain their job or bump onto campus. Clinical faculty are specialized and are needed for teaching our students in the clinic/hospitals. We can never forget the physicians are employees of the clinics/hospitals. Academic Professionals are unprotected except by one year of employment after a terminal contract. I would assume we will have to finish students who were accepted into the UIC COM or maybe we transfer them. I am not sure but I have told those APs asking that the answers will come in time and to continue their work. I also told them if they are uncomfortable to keep their eyes open for employment opportunities.

Ron.

Sent from my iPhone

On Apr 18, 2014, at 9:11 PM, "Few, Nora J" <nifew@illinois.edu> wrote:

just skimmed the feasibility study. where is the text about conflict of interest; job security stuff?

Message

From: Ilesanmi Adesida [REDACTED]

Sent: 4/21/2014 7:44:06 AM

To: Phyllis Wise [REDACTED]

Subject: Re: Med School

Thanks, Phyllis. I am some times amazed at what people make of one sentence or even something that was not said. That is the first time that I heard that I mentioned anything about APs with respect to COM. Our struggle has been how to position the tenure-track faculty. While many are rejoicing about the new COM, some are afraid! As regards bubbles, I think our friend, Eric, is blowing some!

Thanks again.

Ade

On Mon, Apr 21, 2014 at 6:48 AM, Phyllis Wise [REDACTED] > wrote:

Ade,

I would not worry about this. You gave Doug a great answer. There will always be people who see an issue through their slanted lens. We will have plenty of opportunities to explain. But there will always be a few folks who will try to take us sideways.

I am going to forward to you an email I received that said that this is a healthcare bubble and that we should be careful about establishing a COM around a bubble...!!!

Phyllis

Sent from my iPad

Begin forwarded message:

From: Douglas Beck <[REDACTED]>

Date: April 21, 2014 at 6:28:43 AM CDT

To: Ilesanmi Adesida [REDACTED]

Cc: [REDACTED] Phyllis Wise [REDACTED]

Subject: Re: Med School

Hi Ade,

I was sure you had not intended anything like this. What you said, and the conclusions people jumped to are apparently quite different. IMHO, this is the sort of reaction that has to be folded into the planning; maybe the messages can be tuned a little bit to help.

Doug

On Mon, Apr 21, 2014 at 12:33 AM, Ilesanmi Adesida [REDACTED] > wrote:

Doug,

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Subject: Re: feasibilitystudy
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their job or bump onto campus. Clinical faculty are specialized and are needed for teaching our students in the clinic/hospitals. We can never forget the physicians are employees of the clinics/hospitals. Academic Professionals are unprotected except by one year of employment after a terminal contract. I would assume we will have to finish students who were accepted into the UIC COM or maybe we transfer them. I am not sure but I have told those APs asking that the answers will come in time and to continue their work. I also told them if they are uncomfortable to keep their eyes open for employment opportunities.

Ron.

Sent from my iPhone

On Apr 18, 2014, at 9:11 PM, "Few, Nora J" <nifew@illinois.edu> wrote:
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Message

From: Phyllis Wise [REDACTED]
Sent: 4/25/2014 2:30:14 PM
To: Meisinger Dick [REDACTED]
Subject: Better not to correspond on my IL email

Dick,

I have been FOIAed on all correspondence relative to the COM. Please don't ask anything, as innocent as it may seem on that email from your Illinois email.

I left Tim a vm.

Phyllis

Sent from my iPad

From: Phyllis M Wise [REDACTED]
Sent: Friday, April 25, 2014 4:09 PM
To: Umbach Paul
Subject: Going to try to call you later

Paul,
I don't have good news. I'm on a plane from SL to Chicago and should get there around 5:45. I board the next flight at 7:20. I'll try to call you during my layover. Got to call Bob at 6pm. So I'll call before or after that call.

Phyllis

Sent from my iPhone

From: Phyllis M Wise [REDACTED]
Sent: Friday, April 25, 2014 4:10 PM
To: Meisinger, Richard J Jr
Subject: Re: Hey MHSSers!

Excellent.

Sent from my iPhone

On Apr 25, 2014, at 4:02 PM, "Meisinger, Richard J Jr" <rjmjr@uillinois.edu> wrote:

FYI

RICHARD J. MEISINGER, Jr., PhD
Associate Vice President for Strategic Initiatives
Office of the Vice President for Research
UNIVERSITY OF ILLINOIS

346 Henry Administration Building
506 S. Wright St., Urbana, IL 61801
217-265-5455
rjmjr@uillinois.edu

OVPR
ELEVATING IDEAS.
research.uillinois.edu

From: Few, Nora J
Sent: Friday, April 25, 2014 3:41 PM
To: Meisinger, Richard J Jr
Subject: RE: Hey MHSSers!

Good suggestion. I'll pass it on.

Nora J Few, PhD, RD, MScPH -- Executive Assistant Dean -- Student Affairs & Medical Scholars Program

From: Meisinger, Richard J Jr
Sent: Friday, April 25, 2014 1:45 PM
To: Few, Nora J [REDACTED]
Subject: RE: Hey MHSSers!

Nora—Oy Vey! So much concern on the basis of so little information! A suggestion: why not have the Dean's Office invite Paul Umbach to give a presentation based on his research? A lot of these concerns could be addressed efficiently.--Dick

RICHARD J. MEISINGER, Jr., PhD

Associate Vice President for Strategic Initiatives
Office of the Vice President for Research
UNIVERSITY OF ILLINOIS

346 Henry Administration Building
506 S. Wright St., Urbana, IL 61801
217-265-5455
rjmjr@uiillinois.edu

OVPR
ELEVATING IDEAS.
research.uiillinois.edu

From: Few, Nora J
Sent: Thursday, April 24, 2014 5:50 PM
To: [REDACTED] Meisinger, Richard J Jr
Subject: FW: Hey MHSSers!

See below. Also you may both know this already but apparently Paula presented the feasibility study to the Chicago campus faculty senate today with what my source says was less than enthusiasm. A resolution will be drafted and voted on at the next meeting. My source describes the Chicago faculty senate as a few leaders and a lot of yes-men (or women).

Nora J Few, PhD, RD, MScPH -- Executive Assistant Dean -- Student Affairs & Medical Scholars Program

From: Ehrenberger, Kristen Ann
Sent: Wednesday, April 23, 2014 6:20 PM
To: Meyers, Elise Ann Geist; Few, Nora J; Magerko, Katherine A; Baldwin, Jennifer L; Chenyek, Rico Kleinstein; Edwards, Laura Leigh; Chiao, Jonathan W; Ong, Matthew; Mantilla, Bryanna; Smith, Rachel Ann; Adamson, Matthew Darren; [REDACTED] Sanders, Richard Nelson; McLawhorn, Donald Edward Jr
Cc: Crum, Jennifer L
Subject: RE: Hey MHSSers!

Dear All,

You've probably read the News-Gazette article Dean Mariscalco sent around about proposed changes with Carle Hospital and the medical school; two people not involved in the COM have since asked me about this second article:

<http://www.news-gazette.com/news/local/2014-04-19/ui-carle-med-school-partnership-urged.html>

It paints a slightly different picture about that changes that are envisioned. Beyond the reporter's apparent lack of knowledge about the existing medical school and MSP, this second article raises concerns for me about the commitment of the leadership way high up to providing the cross-disciplinary education and training we MHSSers are here to get. Perhaps it is something we could talk about at dinner with Niranjan--if not sooner. I feel a Letter to the Editor coming on...

Second, don't forget the Jim Endersby lunch invitation from the Illinois Project for Research in the Humanities. (Details below.)

Yours always,
Kristen

IPRH is bringing historian of science Jim Endersby to campus, as a keynote speaker for the "Ecological Bodies" symposium on May 1-2. Professor Endersby's lecture, "Models and Metaphors, Orchids and Primroses: When, Why and How is a Person like a Plant?," will take place at 5:00 p.m. on May 2nd, in the Chancellor Ballroom at the I Hotel Conference Center. More info about Professor Endersby and his talk can be found here: <http://www.iprh.illinois.edu/programs/springSymposiumSpeakers.html#Endersby>. The full symposium schedule can be found here: <http://www.iprh.illinois.edu/programs/springSymposium.html>.

In conjunction with his visit, and in collaboration with English and History, IPRH is offering a lunch seminar for faculty and graduate students interested in topics of history of science and science and literature. Your are cordially invited to this lunch, which will take place on **Wednesday, April 30, from 11:30 a.m. to 1 p.m. In the IPRH basement seminar room (805 W. Pennsylvania Ave)**.

As background, participants will be asked to read Professor Endersby's essay, "Sympathetic Science: Charles Darwin, Joseph Hooker, and the Passions of Victorian Naturalists" before the lunch. (Essay available upon registration.)

As lunch will be provided and places are limited, pre-registration is necessary. If you would like to attend, **please RSVP to Nancy Castro at ncastro@illinois.edu by Monday, April 21.**

Sincerely yours,
Kristen Ehrenberger

From: Normand Paquin [REDACTED]
Sent: Wednesday, April 30, 2014 8:27 AM
To: Phyllis Wise
Cc: Laura Frerichs
Subject: Re: Please send the email

Done.

On Apr 30, 2014 7:46 AM, "Normand Paquin" <[REDACTED]> wrote:

I will do that.

Normand

On Apr 30, 2014 7:33 AM, "Phyllis Wise" <[REDACTED]> wrote:
Laura and/or Normand,

I think you should send the email from Jennifer Eardley to Paul Umbach. I had a disappointing phone conversation with Paula last night and she said some of the same things. Paul needs to know where the pushback is going to come from when we present to the health committee.

Phyllis

Sent from my iPad

Message

From: Phyllis Wise [mailto:phylliswise@yahoo.com]

Sent: 4/30/2014 3:06:37 PM

To: Frerichs Laura [REDACTED] Normand Paquin [REDACTED]

CC: Adesida Ilesanmi [REDACTED]

Subject: Last email

Laura and Normand,

I had meant to remove you from the cc of my last email to Ade and pressed the send button by mistake. It is a sensitive email. Please do not forward it and delete it from your inbox. I don't mind your knowing about this. But I don't think it is appropriate for a wider audience.

I wasn't careful enough.

Thanks,
Phyllis

PS thanks for sending the other email to Paul.

Sent from my iPad

From: Phyllis Wise [REDACTED]
Sent: Thursday, May 01, 2014 6:19 AM
To: Paul Umbach
Subject: Re: Can we do our 7 am meeting at Espresso Royal?? (It is scheduled for just you and me)

Paul,

It is so good to hear from you. Sooo much, most not so good, has gone on. There are times when I am sorry I pulled you into this political morass. I wouldn't have the courage to continue this journey were it not for your report backing me up. I am going through Paul-withdrawal.

Absolutely, I would love to meet with you at a Expresso Royale or I can buy the coffee and something to eat and meet you in my office. Where are you staying? When would you like to meet? I will pick you up there and we can go to one close to my office and then I can drive you to your first meeting.

Until Monday,

Phyllis

On Wednesday, April 30, 2014 11:06 PM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Hey friend. Since I am getting in on Sunday night after midnight – could we do our 7 am meeting in a place with better coffee? Not saying that Carle doesn't have good coffee (as I don't know for sure but after working with 800 hospitals, I have a fairly good idea as to the quality of the morning coffee). Please let me know if we can meet off site as we will be locked up all day! ☺

Paul O. Umbach
Founder and President

Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313
Cell Number: [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

"Turning ideas into action for 25 years"

From: Phyllis Wis [REDACTED]
Sent: Sunday, May 04, 2014 9:03 PM
To: Ilesanmi Adesida
Subject: Re: Carle-UI

Ade,

I thought the news article was quite good. Tim feels much more positively than he came across but he had to look neutral since we have not been in front of his committee yet.

The two keys are Bob and CK. And they will be difficult.

I have a lot to tell you - some good and some difficult.

Welcome home,
Phyllis

Sent from my iPad

On May 4, 2014, at 2:55 PM, Ilesanmi Adesida [REDACTED] wrote:

Phyllis,

There is an article in today's News Gazette about the Medical School

<http://www.news-gazette.com/news/local/2014-05-04/ui-carle-relationship-under-microscope.html>

which takes no position. I am not sure when we have our COM meetings, we need to move to engage Tim Koritz further and Don Chambers to make sure that they see the merits for both campuses. e need to draw up a timeline as you suggested previously and also draw up the list of all that we need to talk to. We are identifying all the faculty groups on campus to talk to and sit down with Senate leaders on how we approach all the discussions in the Senate. Just hoping that we can convince Jim and the Board to start talking about money! I don't know exactly who you need to take with you to go and talk to the Mayors of both cities individually. This tax worries by Urbana with respect to non-profits need to be abated. On the long run, the Med School will be a boon to both cities. Wish there was only one Mayor for both!

Ade

From: Phyllis Wise [REDACTED]
Sent: Monday, May 05, 2014 5:20 AM
To: [REDACTED]
Subject: great to see you and Rauner

Dear Mark,

It was great to see you yesterday and to have even five minutes to talk. Makes me want to have much more. I would love to tell you more about how exciting the college of medicine possibility is and to seek your advice on how to navigate all the politics. The politics have taken much more of my time (and learning than I ever expected but would probably not surprise you).

And with regards to politics, I hope you will not share the information I gave you about my support of [REDACTED] I have tried to stay publicly agnostic to the governor's race. We have people trying to contact both Quinn and Rauner to let them know how important a college of medicine for Urbana-Champaign would be for the whole state. Although we do not need legislative or gubernatorial approval, having key people enthusiastic would not hurt. To be effective, I cannot let either of the candidates know where I stand on their race.

I would love to get together with you the next time you are in town or I am in DC.

Stay well,
Phyllis

To: Phyllis Wise
From: Nick Burbules
Subject: Re: CK
Sent: Mon May 05 19:04:46 2014
Importance: Normal

On Mon, May 5, 2014 at 5:37 PM, Phyllis Wise [REDACTED] >
wrote:

Nick,

Thanks so much on the Don Chambers front. I hope that Kennedy will hear you out on this issue. He respects you so much!

Thanks Phyllis,

I did talk with him last week about the Other Matter. I hope I did some good.

I think the Senate meeting went as well as could be expected. There was not a quorum and I wonder whether/what steps can be taken to insure better participation.

I have spoken with the latest senate review commission about things that can be done to improve attendance. I think we will start using the attendance records we collect and either publicize them, or have a rule that if a senator misses three meetings, they are replaced with an alternate.

I also think units could do elections differently, and dept heads and deans could do more to raise the profile (eg, having senators present at faculty meetings about what the senate is doing). In the end we need people who WANT to do it, and we all have to communicate the message that this is important service.

Personally, I also favor making the senate smaller, so that each position matters more. (I'm in a minority on this one.) The problem is that you lose something on the side of representativeness - but if people don't attend you don't get representation anyway.

My first university job had a senate of about 70 or 80 members, and everyone knew who they were. And if your department or college only has a couple of senators, you darn well will make sure they are attending.

Nick

Phyllis

Sent from my iPad

On May 5, 2014, at 5:33 PM, Nick Burbules [REDACTED] >>
wrote:

Thanks Phyllis,

I have spoken with Don a couple of times about these issues, and Joyce has as well.

As of this morning, we had persuaded him (I think) that his role is as a bridge-builder, not a campus partisan. He keeps saying he is not opposed to a medical program here, and that what he wants is a "win-win" outcome.

I also convinced him, I think, to get in touch with you and open channels of communication.

(Of course, he could be playing both sides of the street, too.)

Just off the phone with Joyce. Sounds like the senate did the right thing today, and the JK hardliners looked marginalized and ineffective.

Nick

On Mon, May 5, 2014 at 5:27 PM, Phyllis Wise [REDACTED]
<mailto:[REDACTED]>> wrote:

Nick,

I was just told that Chris Kennedy is meeting with Don Chambers and Larry Schook tomorrow. Anything that you can do to influence what Don says is much appreciated.

So sorry for the short notice, but I was literally just told about this.

Thanks,
Phyllis

Sent from my iPad

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Thanks,
Phyllis

Sent from my iPad

From: Nick Burbules [REDACTED]>
Sent: Friday, May 09, 2014 7:29 AM
To: Phyllis Wise
Subject: Re: THANKS!

On Fri, May 9, 2014 at 6:26 AM, Phyllis Wise [REDACTED] wrote:
Nick,

the NG article today is excellent. I am sure that Kennedy's opinion was formed after his conversation with you. For that I am deeply indebted.

Thanks Phyllis. I'm in Cambridge England, and only just saw this article. I am relieved by his comments, and yes I hope I was able to help a bit.

On the COM issue, I heard that Larry Schook told Kennedy that the COM is not necessary, it is just a toy of Phyllis who wants to have the same toys as the other AAUs. He used the U Minn Duluth model, which is not separately accredited as a successful model of what we can do. We are NOT Duluth. I am afraid that my meeting with Kennedy on May 30 will be to kill any further discussion of a COM for our campus. This will be an uphill battle.

This is the bad news part, and it seems that the meeting that occurred earlier this week sparked his response.

I like Larry but I am not quite sure that this is his role (is he running for UIC Chancellor?). In any event the analogy with UM Duluth is . . . puzzling.

I will be meeting with Don at the end of the month. But he too apparently said to Kennedy he is for a stronger University of Illinois and this does not require a separate COM in Urbana-Champaign.

Well, I will just say this is not what he has said to be. If he wants to be the "win-win" bridge builder, then the question should be HOW to create a program that Urbana wants, in a way that doesn't threaten or damage UIC. There ought to be a way to navigate that.

Thanks again for all your balanced and respected advocacy.
Phyllis

From: Phyllis Wise [REDACTED]
Sent: Tuesday, May 13, 2014 12:44 PM
To: Ed McMillan
Cc: [REDACTED]
Subject: Re: finding time to touch base while we are in Springfield

Ed,

That will be another opportunity. I want to be careful about who might be around us and listening. But we'll figure out a time.

Thanks for being so wonderful!

Phyllis

Sent from my iPad

On May 13, 2014, at 11:05 AM, Ed McMillan [REDACTED] wrote:

I look forward to the opportunity to visit sometime while we are in Springfield. Also, Tim and I will both be at Commencement at UIUC on Saturday.

Ed McMillan
McMillan L.L.C.
105 North 3rd St., Suite 204
Greenville, IL 62246
618-664-9600
Cell [REDACTED]

[REDACTED]

On May 13, 2014, at 11:03 AM, Phyllis Wise [REDACTED] wrote:

Dear Tim and Ed,

There have been a few discussions around the COM that I have had over the past couple of weeks. They have made me re-think a bit about how we strategize about the timing of my presentation to the Health Committee and to the BOT. And I would really like to get your advice as our thinking evolves. I think this will put you in a less awkward position of pushing Chris. I would love to catch a few private moments at some point during the BOT dinner or meeting or afterwards. If we are not successful, I will call you to talk.

Best,
Phyllis

From: Phyllis Wise [REDACTED] >
Sent: Friday, May 16, 2014 6:51 AM
To: Jennifer Woodard
Subject: this Saturday

Jennifer,

I meant to answer your text message yesterday and just plain forgot...

This Saturday's meeting with Phil Sharp is meant to be a meeting where he can tell us about the partnership between Harvard and MIT to provide PhD experiences to MD students at Harvard. I sent him a copy of the T-U report and he will likely comment on it. The meeting is only an hour long.

While I understand BCG's interest in our COM and is standing by to help, I just don't think this is the appropriate platform or meeting for them to attend. I don't know exactly who will be able to attend, so I am not sure that it will help them to understand what we are trying to do or how they can help.

I hate to say no to you, but I just don't think this is the right place for them to participate. I don't know how to take advantage of their offer to help. Perhaps you and I can meet with them when I am in Chicago next so that I can understand better what their goals and expertise are.

Phyllis

From: Phyllis Wise [REDACTED]
Sent: Sunday, May 18, 2014 5:46 PM
To: Paul Umbach
Subject: Fw: Letter from Senator Rose
Attachments: UI-Carle.pdf

Paul,

It has been such a long time since we talked. There have been many conversations, but none of great import and I hate to bother with a minute by minute report on progress (or lack thereof).

I did have a very good conversation with one of the members of my Strategic Advisory Board which made me rethink a bit about how we should handle the next steps. I also had a disturbing conversation (with the other two chancellors) with Chris Kennedy - which was not about the COM.

I thought you would like to see this letter that one of our legislators sent to Bob Easter.

I'd be happy to call you this evening if you have time.

Best,
Phyllis

On Sunday, May 18, 2014 11:24 AM, "Wise, Phyllis M" <pmwise@illinois.edu> wrote:

Phyllis M. Wise
Chancellor, University of Illinois at Urbana-Champaign
Swanlund Administration Building
601 East John Street
Champaign, IL 61820
Phone: (217) 333-6290
Fax: (217) 244-4121

From: Leonard, Andrea [<mailto:ALeonard@senategop.state.il.us>]
Sent: Tuesday, May 13, 2014 4:14 PM
To: Wise, Phyllis M
Cc: DeLorenzo, Michael T
Subject: Letter from Senator Rose

Please see the attached letter from Senator Chapin Rose. Thanks so much!!

Andrea Leonard
Legislative Assistant to
Senator Chapin Rose
51st District
M103-F State House
Springfield, IL 62706
(217)558-1006

(217)782-9586 fax

SPRINGFIELD OFFICE
103D STATE CAPITOL
SPRINGFIELD, IL 62706
217/ 558-1006
FAX: 217/782-4079



CHAPIN ROSE
SENATOR • 51ST DISTRICT

DISTRICT OFFICES
510 S. STALEY RD.
SUITE D
CHAMPAIGN, IL 61822
217/607-1853
FAX: 217/607-5471

5130 HICKORY POINT FRONTAGE RD.
SUITE 103
DECATUR, IL 62526
217/330-9356
FAX: 217/330-9357

May 13, 2014

President Robert A. Easter
University of Illinois
364 Henry Administrative Building
Urbana, IL 61801

Dear President Easter,

I write today as an elected legislator that represents much of east-central Illinois, a double alumnus of the University of Illinois, and an interested citizen regarding the recent news of administrators at the Urbana-Champaign campus beginning discussions of a partnership with the Carle Medical System to open a new medical school at the flagship campus.

I recognize that conceptually we are only in the infant stages of this project and that many questions remain, but I believe very strongly in the potential positive economic, academic, and healthful effects such an undertaking would mean for our region, the State of Illinois, and our country. I agree and share the enthusiasm expressed in Sunday's News Gazette Editorial (May 11, 2014) which opined, "the kind of technological advances being contemplated would surely generate spinoff companies, and the resulting economic development could be transformative."

Moreover, our nation is facing a critical shortage of physicians. According to the Wall Street Journal, we need another 150,000 physicians to meet the coming demand for medical care. This urgent priority of medical capacity was the topic of a bill I introduced last year, SB 1576. While that bill was later subsumed into other and ongoing efforts in state government to address the issue, the fact remains that we need more doctors in America. Clearly a proposal such as this should be heralded as addressing that critical need.

If allowed to flourish, a new medical college would provide an economic boon to the region. This is the kind of forward thinking and visionary action our community and state have come to expect of a world class research institution like the University of Illinois. To that end, I would like to lend my voice to the growing chorus of supporters of this incredible opportunity.

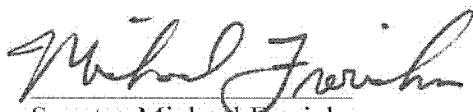
Finally, I am joined by my colleagues who also represent Champaign County in the General Assembly in our support for a continuation of this conversation. Signatures to that effect are attached. If I can be of any assistance as the University further explores this idea, please do not hesitate to call.

Best regards,



Chapin Rose
State Senator - 51st District

Champaign County area legislators who also support continuing the conversation of creating a medical school at the University of Illinois Urbana-Champaign:



Senator Michael Frerichs



Rep. Naomi Jakobsson



Rep. Bill Mitchell



Rep. Adam Brown



Rep. Chad Hays

Cc:

Governor Pat Quinn
University of Illinois Board of Trustees
Phyllis A. Wise, Chancellor

From: Phyllis Wise [mailto:
Sent: Sunday, May 18, 2014 10:09 PM
To: Paul Umbach
Subject: Re: Letter from Senator Rose

Dear Paul,

It was great to talk tonight! I will work to have someone with me at as many of my meetings as I can. I need to find someone who can be an honest broker. Laura would be perfect but she is not in Chicago a great deal and with her [REDACTED] it is not easy. Jennifer Woodard is good for some folks but not others. Both Laura and Jennifer work for Larry Schook so they are not good for my conversation with him. Larry is undermining Jennifer and trying to undermine Laura because they are so deeply into our project. I will work on this.

And indeed, our conversation about Carle is just between us. We could not do it without them and they REALLY want to become a major research clinical enterprise.

Phyllis

On Sunday, May 18, 2014 9:03 PM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Dear Phyllis:

Nice talking with you tonight! I like the plan of having everything ready in September for a winning presentation of a winning plan. Remember that you are much stronger at the "listening sessions" if you have someone along – as it changes the dynamics in your favor. Finally, my comments on Carle were just for "us kids" – as their participation (and their \$100 million) is CRITICAL in the early going – so long as we don't give them a life time membership as sole provider – which actually doesn't help them either. I strongly believe [REDACTED] – so in the end it won't matter. Good night my friend.

Paul

Paul O. Umbach
Founder and President

Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313
Cell Number: [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

"Turning ideas into action for 25 years"

From: Phyllis Wise [mailto:
Sent: Sunday, May 18, 2014 6:46 PM
To: Paul Umbach
Subject: Fw: Letter from Senator Rose

Paul,

It has been such a long time since we talked. There have been many conversations, but none of great import and I hate to bother with a minute by minute report on progress (or lack thereof).

I did have a very good conversation with one of the members of my Strategic Advisory Board which made me rethink a bit about how we should handle the next steps. I also had a disturbing conversation (with the other two chancellors) with Chris Kennedy - which was not about the COM.

I thought you would like to see this letter that one of our legislators sent to Bob Easter.

I'd be happy to call you this evening if you have time.

Best,
Phyllis

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Phyllis M. Wise
Chancellor, University of Illinois at Urbana-Champaign
Swanlund Administration Building
601 East John Street
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Sent: Tuesday, May 13, 2014 4:14 PM
To: Wise, Phyllis M
Cc: DeLorenzo, Michael T
Subject: Letter from Senator Rose

Please see the attached letter from Senator Chapin Rose. Thanks so much!!

Andrea Leonard
Legislative Assistant to
Senator Chapin Rose
51st District
M103-F State House
Springfield, IL 62706
(217)558-1006
(217)782-9586 fax

From: Phyllis M Wise [REDACTED]
Sent: Tuesday, May 20, 2014 10:17 AM
To: [REDACTED]
Subject: Re: Fwd:

I would ask him if there is anything you can do to help him. Is there a better way to communicate with him. Just play his game.

I don't know Mike Devocelle. I wonder whether Christophe can help here. I am sure I will get to know him but not in time to protect you at this moment.

What time of day is your IMD meeting on July 15?

Phyllis

Sent from my iPhone

On May 20, 2014, at 7:00 AM [REDACTED] wrote:

Thank you for your thoughtfulness! I did speak with LS about working on the COM project, and he said "go ahead if you want to." He also made critical comments about the project itself. Mike D refers to Bob's new chief of staff....whom I do not know.

[REDACTED] I will follow your advice.

Meanwhile, i will raise the July IMDC presentation with team at mtg this week. If possible, you would be ideal presenter. I would think about inviting key IMD constituents to that mtg. The press is always there. Nice opportunity.

So sorry to have my personal battles adding to your already full plate!! MANY thanks!

Sent from my iPhone

On May 19, 2014, at 11:53 PM, Phyllis Wise [REDACTED] > wrote:

Jennifer,

I assume he was referring to your trip to Champaign on Saturday. I would play it innocent and naive: I had thought that finding out about the feasibility of a COM in Urbana-Champaign would fall under my responsibility as Director of Strategic Initiatives. I did not know that I was supposed to ask permission to travel to each meeting individually. I do think that this may have intersections that are worth investigating for the IMD. Do you think that this is a possible way for the IMD to fulfill its mission? Do you not want me to explore this opportunity to build the university and to build the IMD so that it serves the university better?

Have you asked his permission to work on the COM in U-C? If not, I would be careful.

[REDACTED] He says he wants to talk with Mike D. I assume he means Mike DeLorenzo. I would talk with him as soon as you can to let him know about your deteriorating relationship with Larry so that Mike knows how to respond - i.e. you are one of many people who we have asked for advice/criticism on the COM because of your connections across the university and your work with the IMD. He should also appear surprised that there is any problem here.

Phyllis

On Monday, May 19, 2014 12:06 PM, Jennifer Woodard
<[REDACTED]> wrote:

FYI. Very disturbing. No conversation with me at all. Not sure how to handle. He asked to meet with me next Tuesday afternoon (the 27th).

----- Forwarded message -----

From: **H L Rockwood <[REDACTED]>**
Date: Mon, May 19, 2014 at 11:58 AM
Subject: Fwd:
To: [REDACTED]

On Mon, May 12, 2014 at 7:42 AM, H L Rockwood
<[REDACTED]> wrote:

-----Original Message-----

From: Schook, Lawrence B
Sent: Friday, May 09, 2014 9:20 PM
To: Kuzmuk, Kristy N
Subject: Re: Can you believe this!?

Might help if she communicated! She is always unavailable! Another issue to discuss on Monday. We need to use this position to meet salary needs. Please discuss with Mike D.

Sent from my iPhone

> On May 9, 2014, at 9:16 PM, "Kuzmuk, Kristy N" <kuzmuk@uillinois.edu>
wrote:
>

> Not sure. It was not on the shared travel calendar. It may help if you have a discussion with her to clarify what she should and should not be doing.

>

-----Original Message-----

From: Schook, Lawrence B

Sent: Friday, May 09, 2014 7:30 PM

To: Kuzmuk, Kristy N

Subject: Can you believe this!?

Why was she there? This is very disturbing. Please reach out and ask her why she was there and why she traveled to attend without approval. Or was she there for the IMD?

From: Phyllis Wise [REDACTED]
Sent: Wednesday, May 21, 2014 7:38 AM
To: Normand Paquin
Subject: Re: Fwd: Univ Illinois Carle COM Check-in

I meant in July....

On , Phyllis Wise <[REDACTED]> wrote:

No, I told Paul that it was unlikely that I would be able to present in May but I'm not certain and won't be until after my May 30th meeting with CK. I'll talk with you as soon as we can find a time.

On Wednesday, May 21, 2014 6:18 AM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

Is this correct? If so, does Carle know?

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

----- Forwarded message -----

From: **Paul Umbach** <PUMBACH@trippumbach.com>
Date: Tue, May 20, 2014 at 9:28 PM
Subject: RE: Univ Illinois Carle COM Check-in
To: Normand Paquin <[REDACTED]>
Cc: Beth Paul <BPAUL@trippumbach.com>

Dear Normand. I had a very good conversation over the weekend with Phyllis and it was clear from our talk that she will not be presenting until September. Just wanted to let you know. Let's talk soon by phone to catch up. Sincerely, Paul

Paul O. Umbach
Founder and President

Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: [412.281.2313](tel:412.281.2313)
Cell Number: [REDACTED]
Fax Number: [412.281.9946](tel:412.281.9946)
www.trippumbach.com

"Turning ideas into action for 25 years"

From: Normand Paquin [mailto:[\[REDACTED\]](#)]
Sent: Tuesday, May 20, 2014 11:54 AM
To: Beth Paul
Cc: Patricia.Adams; Paul Umbach; Stephanie.Beever; Ha Pham; Ha Pham; Meagan.Close
Subject: Re: Univ Illinois Carle COM Check-in

Dear Beth,

Thank you for the time line. Stephanie and I briefly discussed it and we share a common concern as to how we will be working with Tripp-Umbach until June 20th. In particular, do you see yourselves soon providing an outline that of the business plan document you would like to produce? We think getting an outline identifying the key questions to be answered and the data we will need to gather as potentially a good step in getting our working groups focused on the right tasks. Understanding the sequence you would like to see us take to completing these tasks would also be useful. We also realize some of this might be iterative. Can you also comment on how you would like to interact with our working groups as they progress and start to have questions you can assist them with?

We would like to propose that we organize a brief call to talk specifically on these issues. We can have Meagan work to schedule such a call.

Another point worth mentioning is the potential importance of July 14 as a day where the Chancellor might be presenting to the BOT Health committee. I believe Paul and the Chancellor have discussed what might be in place by then. It would be good to incorporate this into the time line.

We look forward to hearing your thoughts on these matters. Your success is our success and vice versa!

Best regards,

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [\[REDACTED\]](#)

On Sun, May 18, 2014 at 6:21 PM, Beth Paul <BPAUL@trippumbach.com> wrote:
Hi, Patty.

Attached is Tripp Umbach's proposed timeline for the development of the business plan. Some of this may change as the summer progresses, but these are our recommendations regarding timing at this point. Please let me know if you have any questions.

Paul will be joining the call tomorrow at 9:30 CT and I will be joining at 10:00 CT. Ha is unable to join the call tomorrow but we have scheduled the Monday calls on our calendars and will both be joining the calls after this week.

Hope you had a great weekend. Looking forward to speaking with you tomorrow.

Beth

From: Patricia.Adams [mailto:Patricia.Adams@carle.com]
Sent: Thursday, May 15, 2014 9:45 PM
To: Beth Paul; Paul Umbach
Cc: [REDACTED] Stephanie.Beever
Subject: Univ Illinois Carle COM Check-in

Hi Paul and Beth

I wanted to follow up on a few items for this project:

We were anticipating a timeline for the business plan development, is that forthcoming from your group?

For your reference I have attached our notes from May 5th and from our internal meeting May 13th.

We are working on each of our organizations list of Must Have's and expect to discuss these during a meeting on May 23rd at 10:30 – 12:00 CT. Would you be joining that call?

We are also developing our list of goals for the COM. We have a draft and think they will be finalized by our meeting May 23rd as well.

We understand that, per our contract, there would be a weekly project call to include you and the respective project coordinators. Right now I don't think those have been scheduled, but internally Steph and Normand (and Laura and Patty) have a Monday check in call scheduled at 9:30 am CT. Can you join those in lieu of trying to coordinate another call for you, Steph and Normand? We have a call planned for Monday May 19th. Let me know if we can send you a calendar invitation. If this doesn't work for you, please propose the best way you think we should handle/schedule the calls between yourself and the project coordinators.

Thank you, Meagan is still coordinating times for the executive meetings.

From: Phyllis Wise [REDACTED]
Sent: Friday, June 13, 2014 7:05 PM
To: Ilesanmi Adesida
Subject: Re: Letter to UIC

Ade,

I think we should respectfully accept Olivera's offer and maybe copy Michele, Dimitri and Lon. You should know that Stephanie from Carle said that there are some clinicians/faculty who they do not think would be helpful. I assume they do not include these folks. We need to keep them here and engaged and appreciated.

Phyllis

Sent from my iPad

On Jun 13, 2014, at 4:39 PM, Ilesanmi Adesida [REDACTED] wrote:

Phyllis,

I have sent the letter to the faculty. One responded to thank me for sending it. i think that they have been feeling the heat from their higher-ups! However, I received an email today from professor Oliveiro, one of the neurosurgeons, that they are willing to help out. They stayed here due to the possibility of the medical school.

Ade

On Thu, Jun 12, 2014 at 12:04 PM, Phyllis Wise [REDACTED]m> wrote:
Ade,

Our hope is that they come to you (or Normand, Steve, or Jennifer) and say that they want to participate and are willing to put that in writing. Then we would be irresponsible to not let them participate.

Phyllis

Sent from my iPad

> On Jun 12, 2014, at 4:10 AM, Ilesanmi Adesida [REDACTED] wrote:

>

> Dear Phylis,

>

> Thanks for looking over the letter to Dimitri and Lon. I will study the two versions well. The major issue that Normand pointed out to me is that if we completely recuse the UIC-COM faculty, then we will have only Jennifer Eardley and Steve Boppart from our side who are knowledgeable on current medical curriculum and clinical issues. Many of the so-called UIC-COM faculty actually have 0% or finite amount of appointments with our campus either in LAS or other places. Anyway, we will have to tell them they cannot participate even though almost all

of them are very enthusiastic about the project.

>

> Ade

From: Ilene Nagel <Ilene.Nagel@russellreynolds.com>
Sent: Monday, June 16, 2014 1:17 PM
To: Ilesanmi Adesida
Cc: Ilene Nagel; Bridget Hough-Meynenc; Charles Kaler
Subject: New Medical School Dean search
Attachments: _Relevant Assignments in Higher Education - Current Listing Med Schools.doc

Dear Ade:

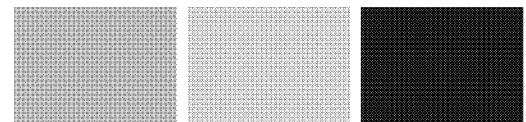
I hope you are well. I heard a rumor that the U. of Illinois will be starting a Medical School. If true, and if you are planning a search for a founding Dean, we would love to be considered. I have appended here a list of searches I have led, that highlights those in academic medicine. As you will see, I have led searches in Medicine for Hopkins, Stanford, Brown, UVA, the University of Michigan, Rutgers, UAB, Wash U, NYU, the Brigham, etc.

If and when you embark on this journey, we would be delighted to assist you.

with warm regards,
Ilene

Ilene H. Nagel, PhD, MLS
Leader, Higher Education Practice
Russell Reynolds Associates
1250 Coast Village Rd Suite J
Santa Barbara, CA 93105
ilene.nagel@russellreynolds.com<<mailto:ilene.nagel@russellreynolds.com>>
805 699 3050 (office)
805 453 2853 (cell)
805 969 0147 (fax)

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RELEVANT SEARCHES IN HIGHER EDUCATION - ILENE H. NAGEL

<u>INSTITUTION</u>	<u>POSITION</u>
Allen Institute for Brain Science	Senior Scientific Director
Arizona Community Foundation	President and CEO
Binghamton University	President; Provost and Vice President for Academic Affairs
Brigham and Women's Hospital (Harvard Medical School)	Chair, Department of Pathology; Chair, Department of Neurosurgery
Brookhaven National Laboratory	Director
Brown University	Dean of the Division of Biology and Medicine
California Academy of Sciences	Executive Director; Dean of Research; Dean of Education
Carnegie Institution for Science	President
City of Bend Oregon	Higher Education Consultant for Science and Research
Connecticut College	President
Cooper Union	President

RUSSELL REYNOLDS ASSOCIATES

Donald Danforth Plant Science Center	President
Duke University	Dean, Pratt School of Engineering; Dean, College of Arts & Sciences; Dean, Sanford School of Public Policy
Emory University	Dean, School of Law
Fordham University	Vice President of Development and University Relations
Fred Hutchinson Cancer Research Center	President and Director #
George Washington University	Provost and Executive Vice President for Academic Affairs
George Washington University, School of Medicine and Health Sciences	Chair, Department of Microbiology, Immunology, and Tropical Medicine; Senior Associate Dean for Research; Senior Associate Dean for M.D. Programs #
Georgetown University Medical Center	Chair, Internal Medicine
Georgetown / Hackensack University Medical Center	Chief Academic Officer
Georgia Institute of Technology	Dean, College of Computing
Illinois Institute of Technology	Provost; Dean, Armour College of Engineering
Indiana University	Dean, Robert H. McKinney School of Law

RUSSELL REYNOLDS ASSOCIATES

Indiana University School of Medicine

Chair, Department of Medicine #

Institute for Advanced Study

Director

Johns Hopkins University

Provost and Senior Vice President for Academic Affairs;
President;
Dean, School of Education;
Dean, Krieger School of Arts and Sciences;
Provost and Senior Vice President for Academic Affairs;
Dean of the School of Medicine, Chief Executive Officer, Johns
Hopkins Medicine and Vice President for Medicine;
Dean, Whiting School of Engineering

Kent State University

Dean, College of Public Health

Lehigh University

President;
Dean, College of Business and Economics

Massachusetts Institute of Technology

President

Menlo College

President

Michigan State University

Vice President for Research and Graduate Studies

Mills College

President

New York University Langone Medical Center

Chair of the Department of Medicine;
Division Director, Pulmonary, Critical Care, and Sleep
Medicine #
Director, Perlmutter Cancer Center #

RUSSELL REYNOLDS ASSOCIATES

New York Genome Center

President / CEO and Scientific Director

Northwestern University

Dean, Law School

Oak Ridge National Laboratory

Deputy Laboratory Director for Science & Technology

Rutgers, State University of New Jersey

Dean, School of Law;

Dean, School of Criminal Justice

Chancellor for Biomedical and Health Sciences

Dean of the Robert Wood Johnson Medical School; #

Dean of the School of Public Health; #

Dean of the School of Health Related Professions #

Salk Institute for Biological Studies

President and Chief Executive Officer

Santa Clara University

Dean, Leavey School of Business

Simons Foundation

Vice President for Research

Smithsonian Institution

Secretary

Supporters of Agriculture Research

President & CEO

Stanford University

Dean, School of Medicine

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Provost and Senior Vice President for Academic Affairs;
Director, Simons Center for Geometry and Physics;
Dean, School of Medicine;
Vice Dean of Clinical Affairs
Provost and Senior Vice President for Academic Affairs
Dean, College of Arts and Sciences

Syracuse University

Dean, School of Architecture

Tulane University

Senior Vice President for Academic Affairs and Provost;
Senior Vice President and Dean, School of Medicine;
Dean, School of Liberal Arts;
Dean, School of Architecture;
Chair, Department of Chemical Engineering;
Director, Sophie Newcomb Memorial College Institute;
Director, Murphy Institute;
Dean, School of Law;
Dean, Freeman School of Business;
Martinez Chair in Biomedical Engineering #
President

University of Akron

Dean, College of Polymer Science and Engineering

University of Alabama at Birmingham

Chair, Department of Pediatrics

University of Alabama at Huntsville

President;
Provost;
Vice President for Research;
Dean, College of Engineering

University at Buffalo (SUNY)

President;
Provost and Executive Vice President for Academic Affairs;
Provost and Executive Vice President for Academic Affairs;
Dean, College of Arts and Sciences;
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Dean, School of Engineering;
Dean, School of Engineering;
Dean, School of Law;
Dean, School of Management;
Dean, School of Medicine;
Dean, School of Nursing;
Dean, School of Public Health and Health Professions;
Vice President for External Relations;
Vice President for Health Sciences;
Vice President for Research;
Vice President of Development;
Chair, Department of Medicine;
Dean, School of Pharmacy;
Chair, Department of Surgery;
Director, UB RENEW #

University of California, Irvine

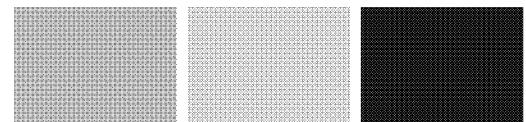
Vice Chancellor of Health Affairs and Dean, School of Medicine #

University of California, Merced

Dean, School of Social Sciences, Humanities and Arts;
Dean, School of Engineering;
Dean, School of Natural Sciences

University of California, San Diego

Vice Chancellor of Research;
Dean, Division of Biological Sciences;
Dean, Division of Arts and Humanities;
Dean, Division of Social Sciences



University of Delaware

Dean of Engineering

University of Miami

Dean of Arts and Sciences

University of Michigan

President

Executive Vice President for Medical Affairs #

University of Minnesota

Senior Vice President for Academic Affairs and Provost

University of Pennsylvania

Dean, School of Arts & Sciences

University of Southern California

Dean of the Dana and David Dornsife College of Letters, Arts, and Sciences

Dean of the Gould School of Law #

University of Texas at Austin

Dean, Cockrell School of Engineering;
Dean, McCombs School of Business;
Dean, Lyndon B. Johnson School of Public Affairs;
Director, Institute of Critical Urban Policy;
Dean, College of Natural Sciences;
Dean, School of Law;
Dean, School of Undergraduate Studies;
Executive Vice President and Provost;
Dean, Cockrell School of Engineering #

University of Texas – Arlington

President

University of Utah

Chair, Department of Medicine #

University of Virginia

Executive Vice President and Provost;
Executive Vice President for Health Affairs;
Dean, Frank Batten School of Leadership and Public Policy

Washington University – School of
Medicine

Chair, Department of Orthopaedic Surgery #

In process

From: Phyllis Wise [REDACTED]
Sent: Wednesday, June 18, 2014 11:06 PM
To: Thomas Farrell
Subject: Re: Thanks

Tom,

Thanks for alerting me to this and thanks for all your advice. I do hope there is a way to convince people at UIC that what we are trying to create is a COM that will complement what they have and will allow better and more collaborations which will benefit both of our campuses and the state, and even beyond.

Thanks again,
Phyllis

Sent from my iPad

On Jun 18, 2014, at 7:32 PM, Thomas Farrell <[REDACTED]> wrote:

Phyllis:

I did just read the proposal. It is really not that bad - it proposes looking at multiple scenarios, including those that result in an Urbana COM. It uses the terms "win win" a lot, so at least that suggest some psychic opportunities.. You will be the ultimate judge, but it could be a useful tool in your efforts (possibly). You need to read it and, hopefully, through related discussions, better understand what UIC and others are seeking to solve for, and if common ground can be reached.

Since you have been asked for an interview, perhaps that opens a door to request the report - in the spirit of working together on finding shared positive outcomes through the work all parties are investing in this important exercise.

My two cents.
Thanks.
Tom

Tom Farrell

On Jun 18, 2014, at 11:47 AM, Phyllis Wise <[REDACTED]> wrote:

Tom,

I am so sorry. I missed your email until now. I am on my way to Beaverton and may have time to call you around 7pm (central time) today (June 18).

Phyllis

Sent from my iPad

On Jun 17, 2014, at 5:49 PM, Thomas Farrell <[REDACTED]> wrote:

Phyllis:

I am happy to discuss over the phone. My cell is [REDACTED]

Anytime after 7pm is fine with me.

I can also make other time available tomorrow or later this week.

Thanks.

Tom

Tom Farrell

On Jun 17, 2014, at 5:29 PM, Phyllis M Wise

[REDACTED]m> wrote:

Tom,

I have not and don't know anything about this. Can you educate me?

Phyllis

Sent from my iPhone

On Jun 17, 2014, at 3:43 PM, TOM FARRELL

<[REDACTED]> wrote:

Hi Phyllis:

Have you seen or been apprised of the content of the UIC COM Manatt Health Solutions proposed study?

Thanks.

Tom

-----Original Message-----

From: Phyllis Wise

<[REDACTED]>

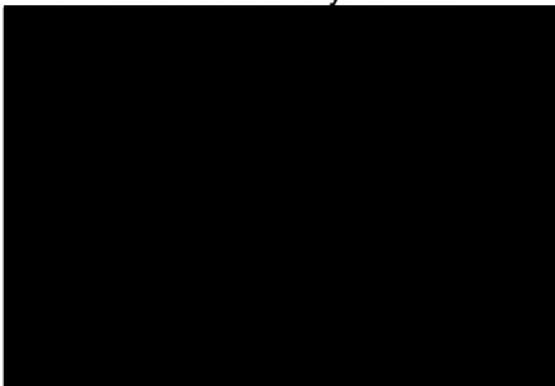
To: Tom Farrell [REDACTED]

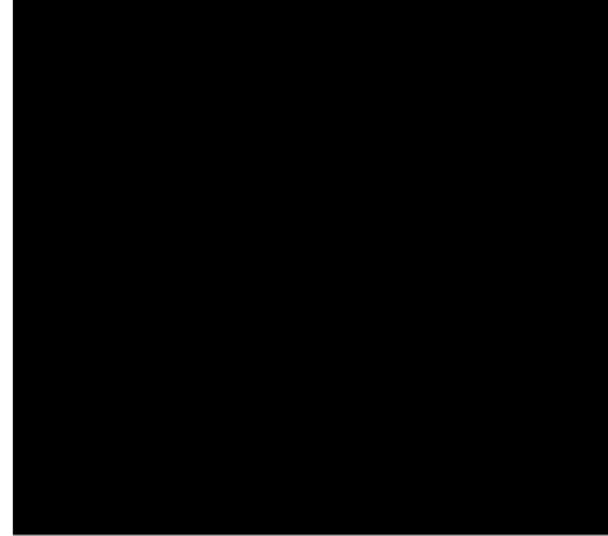
Sent: Mon, Jun 9, 2014 9:35 pm

Subject: Re: Thanks

Dear Tom,

I too enjoyed and learned from our conversation today. I think



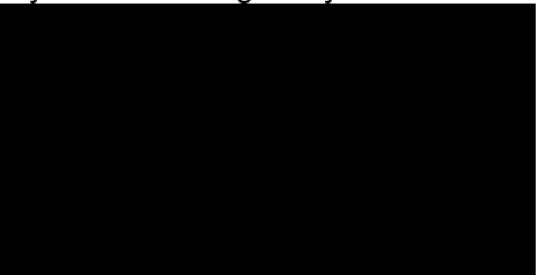


Relative to the COM, I really appreciate your advice and will really try to follow it. I particularly appreciate your assessment of the Tripp-Umbach report and its flaws. I am not sure that we will ever be able to convince UIC that we want to be partners; there is just such a deep seated paranoia about us as the big elephant who will suck all the oxygen out of any room. But I will try even harder now that you have pointed out to me how important it is to get Dimitri and his colleagues to agree to this.

Thanks again for all the advice,
Phyllis

On Monday, June 9, 2014 8:56 PM,
Tom Farrell <[REDACTED]> wrote:

Phyllis:
Thanks for the time today. It is always great for me to be able to spend time with you one on one. I really admire what you are trying to get done, and want to be as supportive as possible. Thank you for listening to my concerns

A large black rectangular redaction box covering the bottom portion of the page content.

I also also wanted to reiterate my
commitment to complete
confidentiality.
Best.
Tom

From: Ilene Nagel <ilene.nagel@russellreynolds.com>
Sent: Thursday, June 19, 2014 10:31 AM
To: Ilesanmi Adesida
Subject: Re:

Dear Ade:

[REDACTED] is lovely; enjoy our [REDACTED]
I will be delighted to hear from you when you are ready.

with warm regards,
Ilene

Ilene H. Nagel, PhD
Leader, Higher Education Practice
Russell Reynolds Associates
805 699 3050 (office)
ilene@ilenehnagel.com
ilene.nagel@russellreynolds.com

On Jun 18, 2014, at 8:07 PM, Ilesanmi Adesida [REDACTED] wrote:

> Dear Ilene,
>
> Thank you for your email. We are still in the beginning stages of planning for a new College of Medicine which will be at the intersection of Engineering and Medicine. We are interested in training people who will become physician inventors, folks concerned with using technology to flatten the landscape of healthcare, and democratize the availability of healthcare and the issue of wellness. So we will be needing a Dean who understands this issues.
>
> Our problem presently is that we are concerned with politics of creating a new medical school in the State and the other problem is that of finance. The first seems to be the most difficult presently. Once we get past these initial stages, then we may start looking for a Founding Dean. That is some ways off. I will let you know when that time comes and make sure that you are on the list for consideration.
>
> I am actually in [REDACTED] for a short vacation. Nice place.
>
> Thanks.
>
> Ade

From: Phyllis Wise [REDACTED]
Sent: Friday, June 20, 2014 5:20 PM
To: [REDACTED] DeLorenzo Michael
Subject: Re: External Economic

Mike,

We could have Normand call in, but I think it would be better if you gave them the timeline. I am not sure whether we have a more recent version than the one I have - I suspect so. I think it would be good for you to send me the most recent version over the weekend and we can review it, if necessary and then you can present it.

Phyllis

Sent from my iPad

On Jun 20, 2014, at 7:25 AM, [REDACTED] wrote:

Phyllis,

Mike D. here.

I thought for the External Economic group meeting Monday we could discuss updates for the COM (you give updates of who you have talked to), the UIC consultant and then membership to the External Economic group. Also, might be good to have Normand call in and go over the time line and give an update on the joint task force meetings with Carle (we are in all day meetings with Carle today discussing timelines, governance etc.).

Let me know if you would like to include anything else.

Message

From: Phyllis Wise [REDACTED]
Sent: 6/20/2014 6:35:02 PM
To: Mike DeLorenzo [REDACTED]
Subject: Re: External Economic

Mike,

This is a great work plan. I think if you want to share the timeline with the group on Monday, that would be fine. But I think it would be better if you do it rather than have Normand call in. You or I can relay the discussion to him and the rest of the group.

Have a great weekend,
Phyllis

Sent from my iPad

On Jun 20, 2014, at 4:06 PM, Mike DeLorenzo <[REDACTED]> wrote:

Phyllis,

I am sending this on the private account. Attached is the draft presentation that the Executive Work Group Team of UI and Carle discussed today. The timeline is on page 4. I can print out just page 4 and have copies for Monday. Unfortunately I cannot change it at this point because it is a PDF generated by Deloitte for the work group, but we can discuss Monday. I also did not produce a printed agenda as we discussed.

Mike

On Fri, Jun 20, 2014 at 5:25 PM, Phyllis Wise [REDACTED] wrote:

Mike,

I meant to add, but I pressed the send button too quickly, that I would like to talk about our meeting with [REDACTED], my meeting with [REDACTED] (which was very good), our meeting with [REDACTED]. I really hope that this groups will be more than just about the COM, and will not be a literal play by play of the gory details. So for example, I think I don't want to talk about my uncomfortable meeting with Dimitri.

Phyllis

Sent from my iPad

On Jun 20, 2014, at 7:25 AM, [REDACTED] wrote:

Phyllis,

Mike D. here.

I thought for the External Economic group meeting Monday we could discuss updates for the COM (you give updates of who you have talked to), the UIC consultant and then membership to the External Economic group. Also, might be good

to have Normand call in and go over the time line and give an update on the joint task force meetings with Carle (we are in all day meetings with Carle today discussing timelines, governance etc.).

Let me know if you would like to include anything else.

<DRAFT Exec Committee Presentation 06_20_2014 v1630.pdf>

Message

From: Phyllis Wise [REDACTED]
Sent: 6/22/2014 9:21:05 AM
To: Jennifer Woodard [REDACTED]
Subject: Fw: consultant contract
Attachments: Manatt U of I Statement of Work (final for signature).pdf

On Saturday, June 21, 2014 11:25 PM, Phyllis Wise [REDACTED] wrote:

Paul,

In the continuing saga, I requested the contract of work that UIC has requested that Manatt Consulting has signed. I am attaching it here. Subsequently the Chancellor asked for the contract that we signed with you. I have just sent that. I'd be happy to talk with you about all of this and the possible repercussions of sharing our contract when they read it.

Phyllis

On Saturday, June 21, 2014 11:21 PM, "Wise, Phyllis M" <pmwise@illinois.edu> wrote:

Phyllis M. Wise
Chancellor, University of Illinois at Urbana-Champaign
Swanlund Administration Building
601 East John Street
Champaign, IL 61820
Phone: (217) 333-6290
Fax: (217) 244-4121

From: Bills-Windt, Caryn [mailto:cabw@uic.edu]
Sent: Thursday, June 19, 2014 11:10 AM
To: Wise, Phyllis M; Easter, Robert A
Cc: Allen-Meares, Paula (UIC); Devocelle, Michael J
Subject: FW: consultant contract
Importance: High

Dear Chancellor Wise,

As requested, attached is the Statement of Work for the Manatt agreement being handled by UIF to do a feasibility study on the impact of the proposed new medical school at UIUC.

Please feel free to contact with me with any additional questions. Thank you. Caryn

Associate Chancellor, Chief of Staff

University of Illinois at Chicago
Office of the Chancellor (MC 102)
601 S. Morgan Street, 2801 UH
Chicago, IL 60612
312-355-0419

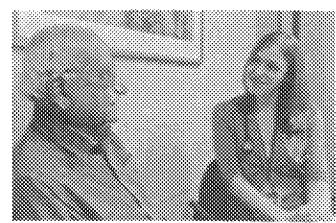
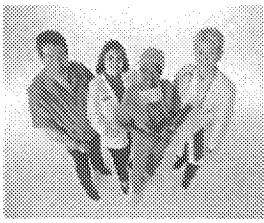
From: Nearhoof, Jeff
Sent: Thursday, June 19, 2014 9:56 AM
To: Bills-Windt, Caryn
Subject: FW: consultant contract
Importance: High

Caryn,

Attached is the Manatt agreement that is being signed.

Jeff

Jeff Nearhoof
Vice Chancellor for Development/Sr. VP for UIF
Office of Development (MC 102)
25th Floor, University Hall
601 S. Morgan Street
Chicago, IL 60607-7128
312 413-3391
Jeff5@uic.edu



The University of Illinois at Chicago

College of Medicine – Strategic Planning

Manatt Health Solutions

May 29, 2014



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I. Engagement Context

The University of Illinois at Chicago – College of Medicine (UIC-COM) with regional sites in Chicago, Urbana-Champaign, Peoria, and Rockford, has requested that Manatt Health Solutions evaluate win-win options for responding to the recently released Tripp-Umbach (TU) consultant report. Co-sponsored by U of I at Urbana-Champaign (UIUC) and the Carle Clinic, the Tripp-Umbach report recommends that a new four-year college of medicine be established at UIUC to capitalize on emerging trends in medicine, with particular emphasis on the synergies between engineering and medicine.

The TrippUmbach report articulates a number of reasons for rethinking how medical education and biomedical research are organized, funded, and delivered at UIUC, including:

- Capture the convergence of medicine and engineering; and create a hub for innovation;
- Increase basic and applied science at UIUC;
- Increase the meaningful involvement of physician-scientists at UIUC;
- Establish a “pipeline to practice” that prepares the next generation of clinicians;
- Stimulate economic development in the Urbana-Champaign region

The purpose of this engagement is for Manatt Health Solutions to provide UIC-COM with the following:

1. Conduct an in-depth analysis of the potential damage and impairment of the assets of the UIC-COM (especially at the Urbana regional site of the UIC-COM) that would occur if the recommendations of the report are implemented as stated.
2. Develop an outline describing how to recoup or limit COM and UIC losses that would be incurred due to losing a valuable asset (COM-UC) should the UI Board of Trustees adopt the recommendations of the TU report.
3. Capture the findings of Steps 1 and 2 into a brief (3-5 page) paper for internal use.
4. Identify several win-win alternative solutions consistent with two mutually exclusive scenarios:
 - o Scenario A: Develop compelling win-win solution(s) that would achieve the objectives of UIUC (Increase biomedical research of UIUC; Increase meaningful involvement of physician-scientists; Capture the convergence of Medicine and Engineering) without having a separate UIUC-Carle medical school (and without impairing the assets of UIC or the COM). An example would be restructuring of the UIC-COM's regional site at Urbana to facilitate the achievement of the UIUC objectives. Another example is the Eng-Med program at UIC-COM.
 - o Scenario B: Develop feasible win-win alternatives for the scenarios that build upon the TU recommendations (for example, similar public-private governance structure of a new UIC-COM encompassing the Chicago, Peoria, and Rockford regional sites).
5. Generate a white paper, covering items 4A and 4B.
6. Develop a public opinion program to inform stakeholders and prepare the public regarding our preferred alternative win-win solutions. The Manatt team will advise on the goals and structure of this strategy though will not conduct it.

PROJECT GOALS

Through this project, we will assist the University of Illinois at Chicago-College of Medicine (UIC-COM) to:

1. Identify the goals that UIUC and the Carle Clinic had for academic advancement which have led to their desire to consider a new medical school.
2. Consider alternative structural, organizational, programmatic, and funding models to achieve these goals (for each of the two main scenarios described above; section I-2A, B).
3. Assess the negative consequences (financial, reputational, logistical) of the TrippUmbach proposal to the four existing UIC-COM regional sites (especially the Urbana regional site of the UIC-COM).
4. Recommend the path forward that promotes the success of the UIC-COM.

Manatt will prepare a "white paper" by July 11, 2014 with the result of this assessment and its recommendations for how to proceed.

Manatt will develop a public affairs program with particular focus on stakeholders, the media and state government decision-makers. The Manatt team will advise on the goals and structure of this strategy though will not conduct it.

II. PROJECT APPROACH

The project approach will be based on gaining an understanding of possible alternative solutions that are consistent with the aspirations of the constituents including UIUC, UIC , and the UIC-COM. Therefore the Manatt team will interview a broad range of decision leaders and key faculty at UIC-COM and select members of the UIUC, UIC, University Administration, Carle Clinic, and OSF. The project will be conducted in two phases. The first phase, to be conducted May through mid-July 2014, will focus on evaluating the potential damage to the UIC-COM from the implementation of the TrippUmbach recommendations; preparing alternative high-level proposals to support aspirations of the UIC-COM; preparing an "White Paper"; and developing an accompanying plan for communicating the ideas contained therein to all stakeholders. The elective second phase would be conducted July through September 2014 to support the UIC-COM during its negotiations with other parties as to a go-forward direction.

PHASE 1 WORK STEP 1: Valuation of COM-UC. Since its inception in the 1970s, UIC-COM has made substantial intellectual and financial investments to nurture the COM-UC regional site and UIC-COM considers this regional site to be a valuable asset. Based on information and insights provided by the client, Manatt will generate an estimated dollar value of the COM-UC assets and potential loss if this

asset were to be lost following implementation the TrippUmbach proposal. The figures will be described in terms of any assumptions, and may contain a range, given the inherent uncertainties associated with any evaluation. The findings will be provided in a short, 3-5 page paper written for internal use only. Any public release of this portion of the report can occur only with the express consent of Manatt.

PHASE 1 WORK STEP 2 Interview Process. Manatt will seek to understand the respective objectives of all parties. We will conduct approximately 15-20 interviews, organized by Manatt in consultation with the UIC-COM. The purpose of these interviews is to provide the Manatt team with an understanding of the objectives of each constituent party: UIUC, UIC, UIC-COM, University Administration, Carle Clinic, OSF, other regional healthcare affiliates, and any essential state and community leaders and evaluation of their response to the leading (and/or relevant) alternative proposals. Based on this understanding, we will prepare a set of guiding principles for a "win-win" approach for each of the two main scenarios (Scenarios A and B) and evaluation criteria that any solution must meet if it is to be accepted. These evaluation criteria will encompass programmatic aspirations and academic advancement, financial cost and sustainability, organizational viability, and speed to implementation. Our tight timeframe dictates that these interviews be completed by mid-June.

PHASE 1 WORK STEP 3, Assess Alternatives. Manatt will identify and develop alternatives for meeting the stated objectives and then evaluate these alternatives against the guiding principles and evaluation criteria. These alternatives may or may not include the TrippUmbach recommendations of new UIUC-Carle medical school and will be divided into two major mutually exclusive scenarios:

- a. Scenario A: Urbana does not get an independent medical school. Solutions are not along the lines of the TrippUmbach report. These solutions would take a different approach to achieving the objectives of UIUC (increase biomedical research of UIUC; Increase meaningful involvement of physician-scientists; Capture the convergence of Medicine and Engineering) without hurting UIC or the UIC-COM. These include:
 - o Governance changes of the Urbana regional site of the UIC-COM as articulated in UIUC proposals of 04/29/12 and 08/25/13;
 - o Create/evolve to a newly-focused Engineering-Medicine program at UIUC, within existing UIC-COM;
 - o Restructuring the UIC-COM into a UI-COM – with new programs launched in support of UIUC-Carle objectives including Engineering-Medicine and others;
 - o Create an "Innovation Center," whose model would support the integration of disciplines across the University of Illinois (Biomedical, Clinical, Engineering, Information Sciences);
 - o Other ideas developed during the course of the project.
- b. Scenario B: UIUC gets its own medical school. Win-win alternatives that are aligned with the TU recommendation. These include:
 - o The proposal for a new 4 year medical school at UIUC as articulated in the Tripp-Umbach report; but the implementation should also consider mechanisms of equivalent investments in UIC-COM to cover all consequential losses.

- New strategic alliances between UIC-COM and regional healthcare partners.
- Other ideas developed during the course of this project.

Each of the alternatives for each of the two scenarios will be succinctly described, with a summary evaluation of their ability to meet the guiding principles and objectives defined in Work Step 2. Proceeding in parallel with Work Step 2, we expect to complete this distillation by the last week in June.

PHASE 1 WORK STEP 4. Propose Preferred Alternative for Each Scenario and Complete Draft White Paper. Based on the preceding work steps, Manatt will complete a draft White Paper which summarizes the aspirations and objectives, reviews the alternatives, and recommends an appropriate model. The White Paper is to be complete in draft form by the first week of July. Manatt expects this White paper to be made public.

PHASE 1 WORK STEP 5. Review Draft White Paper with Decision Makers. The Manatt team will review the draft White Paper with decision makers across UIC. With their input we will finalize the White Paper for distribution in mid-July, in time for the UI Board of Trustees meeting on July 24-25.

PHASE 1 WORK STEP 6: Communication Plan. Though described here as a sequential step, in parallel with steps 1-5 Manatt will develop a plan for communicating with all constituents about the process, the ideas, and the recommendations. This effort should be directed toward building awareness and buy-in for the final recommendations.

Project Deliverables

Step	Key Tasks	Deliverables
Work Step 1: Valuation of COM-UC	<ul style="list-style-type: none">• Estimate net present value of COM-UC and anticipated loss from implementation of the TrippUmbach proposal.• Identify potential resources required for UIC-COM to adapt to the altered environment.	<ul style="list-style-type: none">• Financial analysis.• Internal, 3-5 page written paper.
Work Step 2: Interview Process	<ul style="list-style-type: none">• Prepare workplan and finalize schedules.• Review all relevant work papers & reports.• Conduct approximately 15-20 initial interviews with leadership (these will be spread out over several days and will likely involve two interviewing teams).• Prepare statement of objectives.	<ul style="list-style-type: none">• Statement of objectives.• Proposed guidelines and principles.• Develop guiding principles for win-win solutions.

Step	Key Tasks	Deliverables
Work Step 3: Assess Alternatives	<ul style="list-style-type: none">• Complete evaluation of restructuring objectives.• Evaluate alternatives in terms of ability to meet objectives.• Develop win-win solutions that address both Scenarios A & B.	<ul style="list-style-type: none">• Succinct description of each alternative and evaluation of ability to meet objectives.
Work Step 4: Propose Preferred Alternative for Each Alternative and Complete Draft White Paper	<ul style="list-style-type: none">• Develop one or two alternatives in greater depth, including academic, educational, and clinical dimensions• Prepare draft white paper.	<ul style="list-style-type: none">• Alternative model.• Draft white paper.
Work Step 5: Review Draft White Paper with Decision Makers	<ul style="list-style-type: none">• Review white paper with key decision-makers.• Prepare white paper for distribution	<ul style="list-style-type: none">• Finalize white paper in time for 7/24-7/25 BOT meeting.
Work Step 6: Develop Communication Plan	<ul style="list-style-type: none">• Identify key audiences.• Complete summary "pitch" of proposal to be used in messaging for each audience.	<ul style="list-style-type: none">• Communication plan.

Phase 1: Project Timeline

- Initiate Project: May 27
- Draft White Paper: June 25
- Summary for Board Packet: June 27
- White Paper for Distribution: July 11

Manatt will conduct a project status meeting with the UIC-COM team weekly. The purpose of these weekly meetings will be to track progress, identify and address issues, and develop strategies to overcome any barriers. Manatt will prepare a written status report for each weekly meeting and maintain an issues log.

Manatt recommends that UIC-COM assign at least one individual to work closely with the Manatt team throughout this engagement. UI-COM staff responsibilities will include working with Manatt to complete the internal assessment, providing a current state understanding, serving as an interface to external stakeholders, providing project support, and completing designated assignments.

Phase 2 of the Project will be elective and based on the results of Phase 1. The elective second phase would be conducted July through September 2014 to support the UIC-COM during its negotiations with other parties as to a go-forward direction. If requested, Manatt will prepare an addendum to this Statement of Work, detailing work to be completed in Phase 2.

III. PROJECT TEAM

The Manatt team for this engagement has deep experience with governance, including governance and corporate structure, partnerships, and joint ventures; medical education and education policy at both the undergraduate and graduate levels; biomedical research development; healthcare and higher education strategy; operations improvement, and healthcare financing and delivery. Manatt will have a core strategy team of five:

Role	Individual	Team Function
Project Director	Tom Enders	Mr. Enders will have overall engagement responsibility. Tom brings over 25 years of strategic consulting experience to the country's academic medical centers and medical schools, integrated delivery networks, children's hospitals, health systems and associations including the AAMC and AHA.

Role	Individual	Team Function
Senior Adviser	Arthur Rubenstein, MBBCH	Dr. Rubenstein will provide insight and guidance to the Manatt team in all aspects of this engagement and participate in leadership interviews and meetings. Dr. Rubenstein has deep experience and expertise in research, clinical, and educational leadership, including serving as the Dean and EVP for PENN Medicine, the Dean for the Mt Sinai School of Medicine, and the Chairman of Medicine for the Biological Sciences Division of the University of Chicago. A member of the IOM, he has served on multiple committees relating to conduct of research and scientific integrity.
Lead Consultant	Jon Glaudemans	Mr. Glaudemans will serve as the lead consultant. He will facilitate leadership sessions, participate in interviews, and draft the White Paper. Jon brings more than 30 years of senior leadership experience in healthcare operations, policy issues management, financial analysis, communications and health insurance.
Senior Analyst	Jared Augenstein	Mr. Augenstein will serve as Senior Analyst responsible for preparing interview findings, completing selected research on the alternative models. Jared has supported a number of clients in developing strategic initiatives, largely as they relate to academic programs and delivery and payment reform.

MANATT PROJECT TEAM QUALIFICATIONS

Tom Enders, Senior Managing Director. For over 25 years Mr. Enders has worked to improve the management and delivery of health care, and has worked with leaders and physicians throughout the country to create innovative solutions on a broad range of challenging issues, including improving operating results, developing creative program initiatives, addressing the goals of health reform, and strengthening the ability of organizations to meet the demands of transforming health care. He is a leading consultant to the country's academic medical centers and medical schools, integrated delivery networks, children's hospitals, health systems and associations. He has longstanding relationships with the UHC, the AAMC, and the Children's Hospital Association. A skilled facilitator, his practice includes governance development, strategic and financial planning, organization development, formation and management of new delivery systems models, Medicaid policy and provider delivery transformation, payment and reimbursement reform, mergers and acquisitions, and information technology strategy. He

received his AB from the University of Chicago and MBA from the Yale University School of Management.

Jon Glaudemans, Managing Director. Mr. Glaudemans has more than 30 years of senior leadership experience in healthcare operations, policy issues management, financial analysis, communications and health insurance. His areas of focus include insurance regulation, payer-provider market dynamics, provider payment policy, e-health, health plan administration, health disparities and quality improvement initiatives across a variety of care settings. Prior to joining Manatt, Mr. Glaudemans was Chief Advocacy and Communications Officer at Ascension Health, the nation's largest nonprofit healthcare system, with over 120 hospitals in more than 20 states. In that role, he led the development and execution of an integrated advocacy, government affairs and communications strategy, enhancing Ascension Health's ability to drive the transformation of healthcare, with a primary emphasis on providing access to vulnerable populations. Mr. Glaudemans spent five years as the Senior Vice President/Chief Operating Officer at Avalere Health, LLC, a Washington-based advisory group. In this role, he oversaw a broad array of health policy and business strategy engagements for private, nonprofit and government-sector clients, and helped create and manage the firm's quantitative analytics practice. In addition, he supervised a number of practice areas over his tenure, including payment reform, budget scoring, health IT, Medicaid, reimbursement, long-term care, evidence-based medicine and external communications. In 2001 Mr. Glaudemans was asked to serve as Co-Transition Coordinator for the incoming Administrator for the Centers for Medicare and Medicaid Services. In that position, he played a leadership role in designing and initiating the first federally sponsored prescription drug discount program. Mr. Glaudemans spent a decade at Aetna, where his roles included General Manager of Aetna U.S. Healthcare's Mid-Atlantic Region. In that position, he was responsible for all healthcare sales, services, network, quality, and utilization management activities for a 1,500,000-member health plan. His Aetna tenure began with a role as Vice President for Strategic Planning and Business Development. Mr. Glaudemans began his career at the U.S. Office of Management and Budget (OMB), where he was intimately involved in Medicare budget, regulatory and legislative initiatives.

Jared Augenstein, Senior Analyst. Mr. Augenstein provides research, policy analysis, project support and strategic business services to healthcare providers, payers, pharmaceutical manufacturers and other healthcare organizations. His primary areas of focus are advising public- and private-sector clients, especially healthcare providers, on federal-state collaborative health initiatives, health information technology, federal and state health policy trends and provider markets. Recently, he has worked with The Commonwealth Medical College and The Wright Center on an innovative model for enhancing medical education. He has supported Yale New Haven Health System and the Yale School of Medicine in developing a new organizational alignment for analytics and informatics. He has worked with Children's Medical Center of Dallas on providing strategic business and policy advice related to several population health initiatives. He has also worked with Penn Medicine on their health information technology strategy related to emerging technologies. Mr. Augenstein received an M.P.H. and M.A. from Yale University and a B.A. from Vassar College.

IV. Firm Qualifications

Manatt's vision statement is as follows:

"Manatt is a preeminent law and consulting firm, combining legal excellence, public policy acumen, and industry savvy. We listen, fully grasp the issues, provide superb advice and advocacy, and deliver outcomes that advance our clients' business objectives. These strengths, combined with our rigorous work ethic and exceptional service, earn us enduring client relationships. Our work environment promotes professional development, teamwork, respect, and a fundamental reverence for a broad diversity of people and ideas. We are passionate professionals inspired to make the world a better place."

Manatt Health Solutions (Manatt) is the interdisciplinary health policy and health care strategy advisory division of the firm. Manatt has one of the leading health strategy practices in the country, with a team of consultants, policy advisors, project managers, analysts and health care attorneys providing knowledge and expertise to a wide range of clients, including academic medical centers, specialty hospitals, systems of care and other providers; payers; state and federal policymakers and agencies; philanthropic foundations; and associations. Manatt's expertise and client engagements involve all aspects of health care, including delivery systems, graduate medical education, governance, financing and payment.

Manatt has particular expertise in academic medicine, and has supported the AAMC in its "Readiness for Reform" initiatives and most recently in its 2013 Health Care Affairs program "*Advancing the Academic Health System for the Future*". Manatt has worked with numerous academic centers, medical schools, and faculty practice organizations on issues related to strategy, organization development, and performance improvement. Manatt has completed engagements related to the future of medical education; and is deeply versed in the requirements and opportunities of health reform contained within the ACA. Manatt also has extensive operations experience, including performance improvement, financial analysis and forecasting, and health information technology.

V. FEES

Professional fees for Phase 1 of the engagement will be fixed at \$175,000 for the scope of work as described in this proposal with a schedule beginning May 27, 2014 and ending July 31, 2014, with a payment schedule as follows:

Month	Estimated Fees
May 2014	\$50,000
June 2014	\$75,000
July 2014	\$50,000
Total Fees	\$175,000

Invoices will be prepared monthly and are due upon receipt. Expenses will be billed at cost as incurred, subject to an overall cap of \$25,000.

The following assumptions were made in developing the project approach and corresponding professional and expense fees:

- UIC-COM staff will dedicate sufficient time to support this engagement, including actively participating in meetings, providing timely feedback on draft documents, and fulfilling data requests in a timely manner (timing requirements are dependent upon specific request).
- The project is expected to be completed no later than July 31, 2014.
- Up to 20 interviews are anticipated; it will be essential to have a representative cross-section of stakeholders participate actively in these interviews.
- One Kick-Off Meeting (May) and two leadership sessions (June and July) are anticipated.

VI. TERMS & CONDITIONS

Billing Practices. We submit bills on a monthly basis.

Wire Transfer. You may remit monthly payments to us via wire transfer as follows:

Comerica Bank- California
1021 Glendon Avenue
Los Angeles, CA 90024
Routing number: 121137522
For credit to the account of Manatt, Phelps & Phillips, LLP
Account number: 1890693698

Relationship. We are an independent contractor/grantee and shall not be deemed to be an employee, agent or representative of you.

No Guarantee of Results. Either at the beginning or during the course of our representation, we may express our opinions or beliefs concerning the matter or various courses of action and the results that might be anticipated. Any such statement made by an employee of our firm is intended to be an expression of opinion only, based on information available to us at the time, and must not be construed by you as a promise or guarantee of any particular result.

Late Charges. Each month we send to clients who have amounts outstanding an Unpaid Statement notice listing all such amounts. A client will be assessed a late charge equal to one percent (1%) of the amount included on each notice that has been outstanding more than sixty (60) days. The amount of this late charge will be set forth on the notice. This late charge will be imposed each month on amounts that continue to be outstanding for more than sixty (60) days, including unpaid late charges. Unless a payment applies to a particular invoice, payments are applied to statements that have been outstanding the longest period of time. The costs associated with late payments go beyond a mere cost of funds calculation and make it impracticable or extremely difficult to quantify the actual costs incurred in connection with late payments, and you and we agree that this late charge is presumed to be the cost of a payment that is not made on time. We also note that this late charge provision is not intended to provide our clients with a means of financing their bills, and instead we continue to expect and require prompt payment of our billing statements.

Policy Regarding Sarbanes-Oxley Section 307. Please be advised that our firm has a policy regarding compliance with Section 307 of the Sarbanes-Oxley Act of 2002, SEC Release No. 33-8185, 17 CFR, Chapter II, Part 205. A copy of this policy is available for your review upon request.

Conflicts of Interest. We represent many clients in the health care industry. We have confidentiality obligations to our other clients, and we will not have any obligation to disclose or use in connection with our representation of you any information that we learn in the course of any other representation, even if it would be helpful to you. In addition, we may be asked to represent one or more clients in matters adverse to you or your interests in the future. We will not do so if those matters are directly related to our representation of you, or if the representation involves representing adverse parties in litigation, arbitration or other formal dispute resolution proceedings with you. Otherwise, we will not be limited in representing other clients, even if they are directly or indirectly adverse to you in transactions, negotiations or regulatory, legislative or public policy matters, and you waive any conflict of interest that may exist by virtue of any such adverse representation (it being understood that your waiver does not permit us to use any of your confidential information).

Client. Unless expressly agreed in writing, (i) we only represent the person or entity specifically identified in this engagement letter, and not any related or affiliated person or entity, subsidiary, or affiliated corporation or entity, nor any of your or their officers, directors, agents, partners, or employees, and (ii) our advice may not be relied on by anyone but our client.

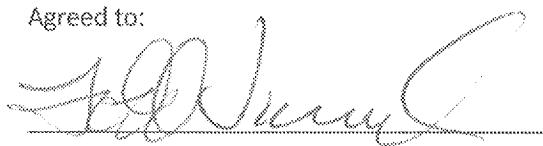
Transmission of Information. Although unencrypted electronic mail, telecopier, cellular telephone, U.S. and foreign mails and private local and overnight couriers may carry some risk that confidential or

privileged information will be intercepted, you authorize the use of these and similar methods by us in commercially reasonable ways.

Arbitration. The University of Illinois and Manatt agree any dispute arising out of or relating to this engagement shall be resolved by submission to binding arbitration in New York, New York, before a retired judge or justice. If the parties are unable to agree on a retired judge or justice, each party will name one retired judge or justice and the two persons so named will select a neutral judge or justice who will act as the sole arbitrator.

The parties shall be entitled to take discovery in accordance with the provisions of the New York Civil Practice Law and Rules, but either party may request that the arbitrator limit the amount or scope of discovery and, in determining whether to do so, the arbitrator shall balance the need for the discovery against the parties' mutual desire to resolve disputes expeditiously and inexpensively.

Agreed to:



Todd Van Neck
Associate Dean for Administration,
University of Illinois-Chicago College of Medicine

Date

Christine C. Devocelle
Vice President for Development Service,
University of Illinois Foundation

Date

Jon Glaudemans
Managing Director
Manatt, Phelps, and Phillips LLP

Date

From: Phyllis Wise [REDACTED]
Sent: Monday, June 23, 2014 1:23 PM
To: Jennifer Woodard
Subject: Re: Fw: consultant contract

Thanks, Jennifer, as always for doing such a thorough job of reading this. You noted I am sure that it is marked confidential. Dimitri is managing this. The wording of the work is definitely his.

I have an early reception/dinner this evening. Be happy to talk afterwards.

On Monday, June 23, 2014 6:39 AM, Jennifer Woodard [REDACTED] wrote:

I was able to download and review, thank you. I will put some thoughts together and share them with you. I am taking this very seriously after reviewing both the specifics of the engagement and the Manatt team's credentials. Do you know who the point person is on the UIC side? Or is Dimitri managing this personally?

Interesting afternoon/evening in Naperville with Durbin. Unable to have private conversation with him, but he continued to emphasize healthcare and innovation in remarks and conversation. But the Sivananthan home was filled with engineers, physicians, and UIUC graduates. Project met with great enthusiasm from this audience. I see a cultivation and development opportunity that we should exploit among the members of this highly entrepreneurial community of Asian Americans.

More when we can talk.

On Sun, Jun 22, 2014 at 9:21 AM, Phyllis Wise <[REDACTED]> wrote:

On Saturday, June 21, 2014 11:25 PM, Phyllis Wise <[REDACTED]> wrote:

Paul,

In the continuing saga, I requested the contract of work that UIC has requested that Manatt Consulting has signed. I am attaching it here. Subsequently the Chancellor asked for the contract that we signed with you. I have just sent that. I'd be happy to talk with you about all of this and the possible repercussions of sharing our contract when they read it.

Phyllis

On Saturday, June 21, 2014 11:21 PM, "Wise, Phyllis M" <pmwise@illinois.edu> wrote:

Phyllis M. Wise
Chancellor, University of Illinois at Urbana-Champaign
Swanson Administration Building
601 East John Street
Champaign, IL 61820
Phone: (217) 333-6290
Fax: (217) 244-4121

From: Bills-Windt, Caryn [mailto:cabw@uic.edu]
Sent: Thursday, June 19, 2014 11:10 AM
To: Wise, Phyllis M; Easter, Robert A
Cc: Allen-Meares, Paula (UIC); Devocelle, Michael J
Subject: FW: consultant contract
Importance: High

Dear Chancellor Wise,

As requested, attached is the Statement of Work for the Manatt agreement being handled by UIF to do a feasibility study on the impact of the proposed new medical school at UIUC.

Please feel free to contact with me with any additional questions. Thank you. Caryn

Associate Chancellor, Chief of Staff
University of Illinois at Chicago
Office of the Chancellor (MC 102)
601 S. Morgan Street, 2801 UH
Chicago, IL 60612
312-355-0419

From: Nearhoof, Jeff
Sent: Thursday, June 19, 2014 9:56 AM
To: Bills-Windt, Caryn
Subject: FW: consultant contract
Importance: High

Caryn,

Attached is the Manatt agreement that is being signed.

Jeff

Jeff Nearhoof
Vice Chancellor for Development/Sr. VP for UIF
Office of Development (MC 102)
25th Floor, University Hall
601 S. Morgan Street
Chicago, IL 60607-7128
312 413-3391
Jeff5@uic.edu

From: Phyllis Wise [REDACTED]
Sent: Tuesday, June 24, 2014 2:12 PM
To: David J. Bellshaw
Cc: Conrad F. Gibson
Subject: Re: Numbers

Dear David,

Thank you for our very useful conversation yesterday. I will keep in touch as we continue to plan for our college of medicine. It's been an exhilarating and challenging journey. I'd be happy to share the Tripp Umbach report with you if you would like to see it. It is long, but this report emboldened us to believe that this would be a game-changer for our university.

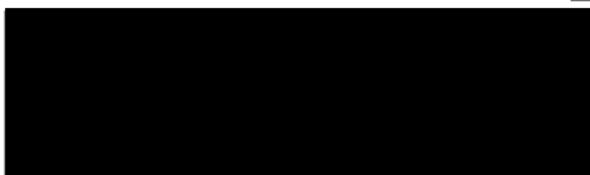
Best wishes,
Phyllis

Sent from my iPad

On Jun 24, 2014, at 12:49 PM, "David J. Bellshaw" <djbellshaw@IMSearch.com> wrote:

Hi Phyllis,

As promised, see below for [REDACTED] and [REDACTED] contact information:



I've cc'd my assistant, Conrad in this email. If you need to find a time at a later date to chat further.

Regards,
David

<image001.jpg>

David Bellshaw | 415.516.0103 | dbellshaw@imsearch.com
Assistant: Conrad Gibson | 415.655.4922 | cgibson@imsearch.com
Isaacson, Miller | 1000 Sansome Street | Suite 300 | San Francisco, CA 94111

www.imsearch.com | Recruiting exceptional leaders for mission-driven organizations

From: [REDACTED]
Sent: Wednesday, June 25, 2014 9:27 AM
To: Phyllis Wise
Subject: Re: Points to be made

It is surely his fondest dream!

Sent from my iPhone

On Jun 25, 2014, at 9:09 AM, Phyllis Wise [REDACTED] wrote:

LS may be thinking [REDACTED]

Sent from my iPad

On Jun 25, 2014, at 9:39 AM, [REDACTED] wrote:

I feel LS and PAM [REDACTED]

[REDACTED] To be continued..

Sent from my iPhone

On Jun 25, 2014, at 7:47 AM, Phyllis Wise [REDACTED] wrote:

Jennifer,

Your added point is really interesting. We've shied away from it but maybe have to state it clearly.

I TOTALLY agree that you cannot say anything if [REDACTED]s present. We have just selected the Interdisciplinary Health Sciences Initiative/institute director (still confidential) and it's not [REDACTED] going to be disappointed/angry/bitter. And [REDACTED] relationship with LS means that nothing will not be pass on to [REDACTED]

Interesting about LS and PAM. I need to talk with you more about that. She has been reaching out to me lately to "stay on one page as we go forward with the COM" (her words).

Phyllis

Sent from my iPad

On Jun 25, 2014, at 7:27 AM, Jennifer Woodard

<[REDACTED]> wrote:

Phyllis,

Thank you carving out the cab time last night to talk! Hope your brief time with [REDACTED] and family brought you smiles.

I agree with all points you make and which will be conveyed. I think we're getting our disciplined, unified messaging clear. We need to add why not under the UIC COM. I am beginning to think that part of that answer is the need for regional and proximate control of our own enterprise in order to be properly responsive to the opportunities and challenges presented as we leverage assets of our engineering program (and other great assets in basic sciences, among others) and the health care delivery needs of Carle and our region. We know we cannot talk about the "quality" issue in Chicago.

I will be on the phone at 5 with our team. A bit concerned about how candid I can be on the phone because the group is greatly expanded and includes [REDACTED] - close friend of LS. I will be in Urbana on July 10th and 11th. I would like to try to use the time to have appropriate meetings.

Learned yesterday that LS is having breakfast mtgs with Paula A-M. [REDACTED]

[REDACTED]
An alliance that will not support us.

See you tomorrow at 8 at University Club. I know that the conversation with Terry will be a productive one - he is one of the true opinion leaders of Chicago.

Jennifer

On Wed, Jun 25, 2014 at 5:58 AM, Phyllis Wise

[REDACTED] > wrote:

Jennifer,

Thanks for the short but really sharp conversation we had last night. Your analysis of the dangers of the Manatt group are so right on. I had read the contract but not distiller it down to this. I don't know whether you will be on the phone with the group at Carle and on campus. But I hope you will convey your thoughts or I can too.

Here are the points we said we would want to convey to them.

1. Two great COMs at the public research university are better than 1. Good for the state, for central IL, for Chicago, for UIC and UIUC.
2. Will be complementary not competitive
3. Will be small, not competing for students, different kinds of students
4. Plays to our unique strengths in engineering, technology, big data
5. Carle has been growing, will add residencies in specific areas that are needed for the patient load and the new engineering based COM: radiology, neurology, then neurosurgery

Look forward to seeing you tomorrow, meeting Terry and talking further with you.

Phyllis

Sent from my iPad

From: Paul Umbach <PUmbach@trippumbach.com>
Sent: Sunday, June 29, 2014 9:57 PM
To: 'Phyllis M Wise'
Subject: RE: Time for a call?

Great! I like our friendship! :)

Paul O. Umbach
Founder and President
Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313
Cell Number: [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

"Turning ideas into action for 25 years"

-----Original Message-----

From: Phyllis M Wise [mailto:[REDACTED]]
Sent: Sunday, June 29, 2014 10:57 PM
To: Paul Umbach
Subject: Re: Time for a call?

Marvelous, Paul. You have so much going on. I'll call you as soon as I get home from my reception. It will be so good to talk. I hate having Normand do all the conversations. I totally trust him, but it's wonderful when we can talk, because we end up talking about more than just the topic we had in mind. And that is so useful.

Until tomorrow,
Phyllis

Sent from my iPhone

> On Jun 29, 2014, at 9:52 PM, Paul Umbach <PUmbach@trippumbach.com> wrote:

>

> Hey friend! I just got home and it might be a bit late to talk -- so let's be sure to talk tomorrow evening after 7:30 pm your time. I am actually in Pittsburgh for NINE days -- just worked out to have lots of Pittsburgh things to do -- including a Tripp Umbach company-wide retreat where folks are coming "home" from 8 locations throughout the US. I am scheduling time to try to visit the CEO in Peoria as I believe a face to face meeting with me much more impactful. I had very productive call with the university CFO and have everyone else on the list scheduled. Can't wait to see you -- missing my Urbana friend. Take care! Paul

>

> Paul O. Umbach
> Founder and President
> Tripp Umbach
> 2359 Railroad St. #3701
> Pittsburgh, PA 15222

> Corporate Headquarters: 412.281.2313
> Cell Number: [REDACTED]
> Fax Number: 412.281.9946
> www.trippumbach.com
>
> "Turning ideas into action for 25 years"
>
>
> -----Original Message-----
> From: Phyllis M Wise [[mailto:\[REDACTED\]](mailto:[REDACTED])]
> Sent: Sunday, June 29, 2014 9:25 PM
> To: Paul Umbach
> Subject: Time for a call?
>
> Paul,
>
> I don't know what time zone you are in and whether you have time for a phone call tonight or tomorrow night. I am free now and am free tomorrow after 7:30pm central time.
>
> Phyllis
>
> Sent from my iPhone

From: Phyllis Wise [REDACTED]
Sent: Monday, June 30, 2014 8:40 PM
To: Phyllis Wise
Subject: Fw: Here is a very brief summary of the the feasibility study that I want the communications team to turn into talking points
Attachments: Executive Summary of Tripp Umbach Feasibility Study (3 Page).docx

On Monday, June 30, 2014 8:09 PM, Paul Umbach <PUMBACH@trippumbach.com> wrote:

Hi. I will call you soon! ☺

Paul O. Umbach
Founder and President

Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313

Cell Number: [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

“Turning ideas into action for 25 years”

From: Phyllis Wise [REDACTED]
Sent: Thursday, July 03, 2014 1:15 PM
To: James.Leonard
Subject: Re: [OFFICIAL] UIUC-Carle Proposal for Separate Medical School

Jim,

I assume she requested permission to talk with them from Bob Easter. Anytime I have spoken with any of them, I have gotten his approval first. He has never said no, but he knows about every conversation. I have spoken with all of them except Trustee Hasara, who I will be speaking with in a couple of weeks. Ade is scheduling a meeting with Jim Montgomery.

Phyllis

Sent from my iPad

On Jul 3, 2014, at 1:56 PM, "James.Leonard" <James.Leonard@Carle.com> wrote:

Interesting that they report at the end of their article that they have met with each of the board members about this- I thought all access was restricted and had to go through the President for permission.....

Jim

James C. Leonard, MD
President & Chief Executive Officer

<image002.png>We will be a world class innovator providing exceptional patient care and research

From: Wise, Phyllis M [<mailto:pmwise@illinois.edu>]
Sent: Thursday, July 03, 2014 9:12 AM
To: Paquin, Normand; Frerichs, Laura Appenzeller; DeLorenzo, Michael T; jeardley@illinois.edu; Schiffer, Peter E; Peterson, Dan C; Bashir, Rashid; James.Leonard; Stephanie.Beever; Khanna, Pradeep K; Kaler, Robin Neal
Cc: Umbach Paul; Adesida, Ilesanmi
Subject: Fwd: [OFFICIAL] UIUC-Carle Proposal for Separate Medical School

FYI

Sent from my iPad

Begin forwarded message:

From: "Pierre, Christophe" <chpierre@uillinois.edu>
Date: July 3, 2014 at 8:48:39 AM CDT
To: "Wise, Phyllis M" <pmwise@illinois.edu>, "Adesida, Ilesanmi" <iadesida@illinois.edu>
Subject: FW: [OFFICIAL] UIUC-Carle Proposal for Separate Medical School

I am sure you saw this but just in case.

C-

From: Official Announcement <official_owner@uic.edu>
Reply-To: "Soto Plutz, Teresita D (UIC)" <teresas@uic.edu>
Date: Thursday, July 3, 2014 at 8:35 AM
To: "OFFICIALX_FACULTY@LISTSERV.UIC.EDU"
<OFFICIALX_FACULTY@LISTSERV.UIC.EDU>
Subject: [OFFICIAL] UIUC-Carle Proposal for Separate Medical School

[Click here to see this online](#)



Dear Colleagues,

Recently the University of Illinois at Urbana-Champaign (UIUC) and Carle Healthcare System released a consultant's report proposing a new, bioengineering-focused, public-private medical school at Urbana-Champaign.

The leadership of UIC and the College of Medicine are actively engaged in discussions regarding the issues and opportunities raised by this report, including the impact such an approach would have on the future of medical education in the community and the state.

The College of Medicine, with its regional campuses in Chicago, Peoria, Rockford and Urbana-Champaign, is a key academic asset of the University. It is essential to the UI's ability to fulfill its missions for the people of Illinois of providing cutting-edge research, educating future physicians and biomedical scientists, providing health care to both the rural and urban populations of our state, and contributing to economic development.

Over the past year or so, the College of Medicine and UIUC have engaged in discussions to take full advantage of the considerable assets in each organization, and to create additional

entire University of Illinois system to meet the challenges of the 21st century.

As part of this continued dialogue, UIC and the College of Medicine are reviewing the consultant's report, and developing alternatives that leverage the considerable potential of the College to adapt to address emerging workforce needs, and the rich resources of the UIUC campus in the areas of bio-engineering, high-speed computing, and other areas. We want to ensure that any recommendations complement the robust collaborative relationships and programs that are currently in place throughout the College of Medicine and the entire University of Illinois system. We will share these alternative proposals with you in anticipation of presenting them to President Easter and the Board of Trustees later this summer/early fall.

The UI College of Medicine, one of the largest and most diverse medical schools in the U.S., plays a vital role in the health of Illinois residents. As part of a comprehensive health sciences system which includes the UI Hospital, outpatient and neighborhood clinics, six other health science colleges, and four regional sites, the College of Medicine focuses on advanced, multidisciplinary approaches to community health, global health, and reducing urban and rural health disparities. It received \$83 million in funding from the National Institutes of Health last year.

The regional College of Medicine at Urbana-Champaign is an inseparable part of this enterprise. Its unique attributes contribute to the strength of the University and to the health of the people of the state. Since opening in 1971, enrollment has grown to more than 300 and its wide-ranging curriculum now spans all four years. Approximately 40 percent of all first year medical students are educated on the Urbana campus. The Medical Scholars Program provides graduate and medical training for

disciplines including engineering, behavioral sciences, humanities, physical sciences as well as the biomedical sciences. An M.D./J.D. is offered in partnership with the College of Law, and an M.D./M.B.A. option is also available.

Our College of Medicine sites in Peoria, Rockford and Chicago also showcase unique resources and programs that add to the collective strength of the institution and have an economic impact. The strong history of volunteer educators and advances in simulation in Peoria; a tradition of rural health education in Rockford; and Chicago's commitment to urban health, translational medicine, and innovation through the newly named Richard S. and Loan B. Hill department of bioengineering housed in the Colleges of Engineering and Medicine demonstrate the wider impact that the College of Medicine can have on physician training, biomedical research, and healthcare delivery.

Medicine on the Urbana-Champaign campus is thriving. It is also hungry and poised for intellectual and programmatic growth. Illinois residents and patients everywhere will be well served as it continues to move forward.

On July 14th, I will be convening a meeting with Chancellor Wise, Provosts Kaufman and Adesida, and Dean Azar to discuss the most effective strategies to address the challenges of training the next generation of physicians and physician-scientists, and to pursue opportunities to expand the University's portfolio of biomedical and bioengineering research. Moreover, I have individually met with each member of the Board of Trustees to discuss this important issue.

Sincerely,

Paula Allen-Meares
Chancellor
John Corbally Presidential Professor

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From: Ilesanmi Adesida [REDACTED]
Sent: Friday, July 04, 2014 6:50 PM
To: Phyllis Wise
Subject: Topics

Phyllis,

We do need to go and see [REDACTED] and I [REDACTED] That would be very useful.

On the communication with faculty in response to UIC mass mail, you are correct, this is not the time to send a mass mail on our campus. After BOT and Academic Senate discussions, we can figure that out.

Please enjoy [REDACTED]

Ade

From: Ilesanmi Adesida [REDACTED]
Sent: Sunday, July 06, 2014 4:13 PM
To: Phyllis Wise
Subject: Meeting

Phyllis,

We will be meeting Paula, Lon, and Dimitry on July 14th according to the agenda that they have prepared.

-
- 1- Statement of the viewpoint of the President's office. (Christophe)
 - 2- The current status and the immediate future for the UI COM at UIUC. (All)
 - a. How can we assure minimal impact as this entire process moves forward?
 - 3- Summary of the planning and consultative process now in place at UIC to explore the various ways in which we can achieve so-called win-win situation. (Dimitri)
 - 4- Summary of the planning and consultative process now underway for the UIUC – Carle free-standing private COM. (UIUC)
 - 5- Next steps- when do we meet again to assure item 2a and that we remain in synch regarding the defining of win-win outcomes. (All)

I would suggest that the two of us meet so that we can map out a strategy for the meeting. They crafted the message from Paula to the UIC campus very carefully. That message is going to be at the root of their strategy. So we will need to be prepared.

Hope [REDACTED] is soothing for a well-deserved rest.

Thanks.

Ade

From: Tim Koritz [REDACTED]
Sent: Monday, July 07, 2014 6:15 AM
To: Ed McMillan; Phyllis M Wise
Subject: RE: today

Thank you Phyllis, very kind of you.

tk

Subject: Re: today
From: [REDACTED]
Date: Mon, 7 Jul 2014 06:35:12 -0400
CC: [REDACTED]
To: [REDACTED]

Thanks Phyllis. It is an honor to be of service to the U of I. Hope you are enjoying your vacation!

Ed McMillan
McMillan LLC
[REDACTED]
[REDACTED]

On Jul 7, 2014, at 2:53 AM, Phyllis M Wise [REDACTED] > wrote:

Dear Ed and Tim,

If we didn't have Trustees like you, the University wouldn't have accomplished what we have or have the potential that it does.

We are indebted to your constant and unwavering dedication.

Phyllis

Sent from my iPhone

On Jul 7, 2014, at 2:10 AM, Ed McMillan [REDACTED] > wrote:

I am just humble to be associated with you two... You have degrees to confirm your intellect!

Ed McMillan
McMillan L.L.C.
105 North 3rd St., Suite 204
Greenville, IL 62246

618-664-9600

Cell [REDACTED]

[REDACTED]

On Jul 6, 2014, at 7:47 PM, Tim Koritz <[REDACTED]> wrote:

Thank you Phyllis.

Thanks Ed.

So proud to be associated with you intelligent and dedicated folks!

tk

Subject: Re: today

From: [REDACTED]

Date: Thu, 3 Jul 2014 05:42:03 -0500

CC: [REDACTED]

To: [REDACTED]

Thanks Phyllis... Have a wonderful vacation!!!

Ed McMillan
McMillan LLC

On Jul 2, 2014, at 11:16 PM, Phyllis Wise

<[REDACTED]> wrote:

Dear Ed and Tim,

Thank you both for talking with me yesterday. Your advice and continuing support are invaluable. Today we met with the Manatt Consulting group, who have been recruited by Dimitri, to assess the damages that would be done to UIC if we established a COM, to evaluate the alternatives. The team that met with them, including Provost Adesida, Dr. Jim Leonard (CEO of Carle), myself, and several faculty did a spectacular job of presenting our case. It will be interesting to see how their report comes out. I have included below the email that I just sent to everyone to thank them for all their efforts.

Best,
Phyllis

On Wednesday, July 2, 2014 11:11 PM, "Wise, Phyllis M" <pmwise@illinois.edu> wrote:

Phyllis M. Wise
Chancellor, University of Illinois at Urbana-Champaign
Swanlund Administration Building
601 East John Street
Champaign, IL 61820
Phone: (217) 333-6290
Fax: (217) 244-4121

From: Wise, Phyllis M
Sent: Wednesday, July 02, 2014 10:47 PM
To: Eardley, Jennifer J; Bashir, Rashid (rbashir@illinois.edu); Schiffer, Peter E; Cangellaris, Andreas C (cangella@illinois.edu); Robinson, Gene E; Boppart, Stephen Allen; 'michelle.olson@carle.com'; 'Laura Frerichs'; Olivero, William Charles; 'matthew.gibb@carle.com'; 'jonathan.bailey@carle.com'
Cc: Adesida, Ilesanmi; Jim Leonard (James.Leonard@Carle.com); Normand Paquin (paquin@illinois.edu); Jennifer Woodard (jwoodard@uillinois.edu); DeLorenzo, Michael T; Stephanie Beever (Stephanie.Beever@carle.com)
Subject: today

Dear Everyone (and I hope I have not missed anyone)!

We (Jim, Ade, Steph and I) cannot thank you enough for the amazing job that you did today. Jennifer Eardley gave us a brief initial summary of all of the sessions and it is clear that you gave the consultants the real picture of the strengths of both the University of Illinois at Urbana-Champaign and the Carle Health System. You clearly articulated the opportunity/responsibility/obligation that we have to offer better healthcare to more people with less costs through engineering/big data/technology that only we can provide. You emphasized effectively that we can do this through a unique innovative curriculum and fundamental and translational research and discovery and innovation that no other university can offer. We made it clear that we have a short window in time when we can be leaders into the medicine of the future.

Many of you spent considerable time preparing material that we used today.

The Manatt consultants went away with a much deeper understanding of what we can/must do to serve our community, central Illinois, Chicago, the state of Illinois and UIC. Jennifer Eardley will be preparing a report that we will submit to Manatt so that they understand what we took away from the discussion – this has to be conveyed accurately in their report to UIC.

Again, we are deeply indebted to you for the amount of time and effort you spent on this. I am certain that it was well worth it – no one group could have been as effective as the groups together.

With deep respect and gratitude,
Phyllis

Phyllis M. Wise
Chancellor, University of Illinois at Urbana-Champaign
Swanlund Administration Building
601 East John Street
Champaign, IL 61820
Phone: (217) 333-6290
Fax: (217) 244-4121

From: Nick Burbules <[REDACTED]>
Sent: Monday, July 07, 2014 6:31 AM
To: Phyllis Wise
Cc: Ilesanmi Adesida; Joyce Tolliver
Subject: Re: [OFFICIAL] UIUC-Carle Proposal for Separate Medical School

Hello Phyllis, Ade,

Thank you both for continuing to carry this forward. I hope the UIC consultants do an honest job - and I hope that UIC will be willing to release a report that undercuts some of their mistaken claims.

Meanwhile, I am coming around to the view that apart from this particular proposal, the underlying institutional arrangement is an historical anachronism that probably should have been set aside long ago (I know people have tried).

It seems to me that this underlying anomaly needs to be questioned from within the governance framework, and I am hoping that there can be a process for doing so. It's just wrong, and indefensible structurally,

Nick

On Mon, Jul 7, 2014 at 2:52 AM, Phyllis Wise <[REDACTED]> wrote:
Ade, Joyce and Nick,

This has been a great exchange. Nick's analysis is right on: there will be some people for whom anything other than one COM is unacceptable. We have tried to create a situation that builds on our strengths, meets a state and national need, and does not compete with them. But even this is not acceptable to some of them.

You, Nick and Joyce, may know that Dimitri recruited a consulting firm to do a counter proposal. They came to visit us last week. The people that met with them (Ade, Jim Leonard, Rashid Bashir, and groups of faculty from our campus and from Carle, and me) really impressed them. Carle was particularly impressive, probably because they were expecting a small community hospital, from everything that they had been told. But even we showed them just how much strength we have on campus, much more than they expected. I hope that their report will help.

We just have to continue to work on this project. Going through all of the processes on our campus, getting our faculty knowledgeable about how it will benefit the campus are essential next steps. You, Nick and Joyce, are going to be such important advisors in all of this. Thank you for all the time you are putting into this - one more thing on your already full platters.

Thanks,
Phyllis

Sent from my iPad

On Jul 7, 2014, at 7:22 AM, Ilesanmi Adesida <[REDACTED]> wrote:

Nick, Joyce,

The stranglehold over our campus on establishing an autonomous COM has lasted for over 40 years! UIUC needs this to further propel herself to the upper echelons of higher education institutions in this nation and the world. UIC sees anything that helps us down here threatening to its own advancement. We will have a chance to talk about this in our meeting later today. Thanks.

Ade

On Sunday, July 6, 2014, Joyce Tolliver <[REDACTED]> wrote:
Ade, thanks for your note. I also saw the message from Chancellor Allen-Meares and have been mulling it over.

Of course you know we are here to help you and Phyllis move ahead on this important initiative in a way that will be grounded in our tradition of shared governance and that will propel our campus, the University, and the state forward. I agree with Nick that this may mean confronting the ways in which the relatively recent administrative structure of the current C of M keeps us from moving ahead.

I see that we have a meeting scheduled for tomorrow afternoon, and I hope we can continue our conversation then, if you think that's the right time and place.

all best wishes
Joyce

On Sun, Jul 6, 2014 at 4:36 PM, Nick Burbules <[REDACTED]> wrote:
Thanks Ade,

I did see it and was disturbed by it. I think there are two camps at UIC - people who have specific concerns about the project, but are willing to raise them in the context of trying to work through them, and people who are determined not to let this happen at all costs.

Part of the issue, I have come to realize, is that the investment runs deep at UIC to see our program as a "regional" branch of their program. They don't like the idea of an independent program, period, no matter what it looks like or how good it might be.

Another aspect of this assumption is that they seem to take it as given that we need need their permission to do anything with the program. My guess is that they would be willing to see new initiatives (bioengineering, etc), as long as they could keep control over it. But of course that doesn't work for us.

This issue, the historical anomaly that you have faculty and programs on one campus that are under the control of another campus, needs to be questioned directly. It makes no sense, and no one would create a program like that from scratch if it were being contemplated today.

But keeping it that way seems very important to UIC. The frequency of their use of the term "regional" (as in Paula's message) is a clue to the importance they attach to this arrangement.

If I'm right, all the specific objections to the proposal (Carle, etc) are for some people just code for what they really think, which is "You can't do this without our permission."

And I wonder, what would they say if the positions were reversed? They like to think of us as a "regional" branch of them, but they would be (rightly) irate to be referred to as a regional branch of us.

Nick

On Sun, Jul 6, 2014 at 4:20 PM, Ilesanmi Adesida <i[REDACTED]wrote:
Nick, Joyce,

I don't know whether you saw this message that went to the UIC campus from Chancellor Allen-Meares last week. This is in relation to the College of Medicine. Charting a path to a new autonomous College of Medicine for our campus will not be a smooth as expected. We have to keep moving and making the case as best as possible.

Ade

----- Forwarded message -----

From: **Adesida, Ilesanmi** <iadesida@illinois.edu>
Date: Sun, Jul 6, 2014 at 3:19 PM
Subject: FW: [OFFICIAL] UIUC-Carle Proposal for Separate Medical School
To: <[REDACTED]>

From: Official Announcement <official_owner@uic.edu<mailto:[official_owner@uic.edu">>>>](mailto:official_owner@uic.edu)

Reply-To: "Soto Plutz, Teresita D (UIC)" <teresas@uic.edu<mailto:[teresas@uic.edu">>>>](mailto:teresas@uic.edu)

Date: Thursday, July 3, 2014 at 8:35 AM

To:

"OFFICIALX_FACULTY@LISTSERV.UIC.EDU<mailto:[OFFICIALX_FACULTY@LISTSERV.UIC.EDU">>"](mailto:OFFICIALX_FACULTY@LISTSERV.UIC.EDU)

<OFFICIALX_FACULTY@LISTSERV.UIC.EDU<mailto:[OFFICIALX_FACULTY@LISTSERV.UIC.EDU">>>>](mailto:OFFICIALX_FACULTY@LISTSERV.UIC.EDU)

Subject: [OFFICIAL] UIUC-Carle Proposal for Separate Medical School

Click here to see this
online<http://www.uic.edu/index.html/Chancellor/newsletters/2014_07_03_uiuc_carle.html>

[U I C Office of the Chancellor]<<http://www.uic.edu/index.html/Chancellor/>>

Dear Colleagues,

Recently the University of Illinois at Urbana-Champaign (UIUC) and Carle Healthcare System released a consultant's report proposing a new, bioengineering-focused, public-private medical school at Urbana-Champaign.

The leadership of UIC and the College of Medicine are actively engaged in discussions regarding the issues and opportunities raised by this report, including the impact such an approach would have on the future of medical education in the community and the state.

The College of Medicine, with its regional campuses in Chicago, Peoria, Rockford and Urbana-Champaign, is a key academic asset of the University. It is essential to the UI's ability to fulfill its missions for the people of Illinois of providing cutting-edge research, educating future physicians and biomedical scientists, providing health care to both the rural and urban populations of our state, and contributing to economic development.

Over the past year or so, the College of Medicine and UIUC have engaged in discussions to take full advantage of the considerable assets in each organization, and to create additional opportunities for the College, UIUC, and the entire University of Illinois system to meet the challenges of the 21st century.

As part of this continued dialogue, UIC and the College of Medicine are reviewing the consultant's report, and developing alternatives that leverage the considerable potential of the College to adapt to address emerging workforce needs, and the rich resources of the UIUC campus in the areas of bio-engineering, high-speed computing, and other areas. We want to ensure that any recommendations complement the robust collaborative relationships and programs that are currently in place throughout the College of Medicine and the entire University of Illinois system. We will share these alternative proposals with you in anticipation of presenting them to President Easter and the Board of Trustees later this summer/early fall.

The UI College of Medicine, one of the largest and most diverse medical schools in the U.S., plays a vital role in the health of Illinois residents. As part of a comprehensive health sciences system which includes the UI Hospital, outpatient and neighborhood clinics, six other health science colleges, and four regional sites, the College of Medicine focuses on advanced, multidisciplinary approaches to community health, global health, and reducing urban and rural health disparities. It received \$83 million in funding from the National Institutes of Health last year.

The regional College of Medicine at Urbana-Champaign is an inseparable part of this enterprise. Its unique attributes contribute to the strength of the University and to the health of the people of the state. Since opening in 1971, enrollment has grown to more than 300 and its wide-ranging curriculum now spans all four years. Approximately 40 percent of all first year medical students are educated on the Urbana campus. The Medical Scholars Program provides graduate and medical training for M.D./Ph.D. scholars in over 30 academic disciplines including engineering, behavioral sciences, humanities, physical sciences as well as the biomedical sciences. An M.D./J.D. is offered in partnership with the College of Law, and an M.D./M.B.A. option is also available.

Our College of Medicine sites in Peoria, Rockford and Chicago also showcase unique resources and programs that add to the collective strength of the institution and have an economic impact. The strong history of volunteer educators and advances in simulation in Peoria; a tradition of rural health education in Rockford; and Chicago's commitment to urban health, translational medicine, and innovation through the newly named Richard S. and Loan B. Hill department of bioengineering housed in the Colleges of Engineering and Medicine demonstrate the wider impact that the College of Medicine can have on physician training, biomedical research, and healthcare delivery.

Medicine on the Urbana-Champaign campus is thriving. It is also hungry and poised for intellectual and programmatic growth. Illinois residents and patients everywhere will be well served as it continues to move forward.

On July 14th, I will be convening a meeting with Chancellor Wise, Provosts Kaufman and Adesida, and Dean Azar to discuss the most effective strategies to address the challenges of training the next generation of physicians and physician-scientists, and to pursue opportunities to expand the University's portfolio of biomedical and bioengineering research. Moreover, I have individually met with each member of the Board of Trustees to discuss this important issue.

Sincerely,

Paula Allen-Meares
Chancellor
John Corbally Presidential Professor

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Joyce Tolliver

From: Ilesanmi Adesida <[REDACTED]>
Sent: Monday, July 07, 2014 11:41 AM
To: Phyllis Wise
Cc: Khanna Pradeep
Subject: Re: [REDACTED] in Hong Kong

Phyllis,

I agree that a straightforward trip to HK would be the simplest. This is important so I can shift other things to make the trip. My commitment is that i have vacation at the end of July/beginning of August. Deb is out today, she will be back in the office tomorrow.

Thanks.

Ade

On Mon, Jul 7, 2014 at 3:07 AM, Phyllis Wise <[REDACTED]> wrote:
Ade,

I am adding Phyllis to this email string so that she can look at my calendar. I am sure you have notified Deb. Maybe we should just do this as a trip only to HK and not worry about going anywhere else on the same trip. That would simplify it a lot.

Phyllis

Sent from my iPad

On Jul 7, 2014, at 2:03 AM, Ilesanmi Adesida <[REDACTED]> wrote:

Phyllis,

[REDACTED] wants us to provide possible dates for the visit.

Ade

On Sun, Jul 6, 2014 at 4:32 PM, Phyllis M Wise <[REDACTED].m> wrote:
Ade,

We should definitely go to HK as soon as we have a business plan. I am copying Pradeep to see whether there is a possibility to combine this with anything else.

Phyllis

Sent from my iPhone

On Jul 6, 2014, at 11:25 PM, Ilesanmi Adesida <[REDACTED]> wrote:

Dear Phyllis,

I have been in touch with [REDACTED] and he informs me that his brother, [REDACTED] has made contact at [REDACTED] in Hong Kong. He wants to introduce them to us. I told them that it would be wise for us to come to Hong Kong to meet them in person. Communicating by emails don't do justice to this level of contact. They want to know what we would like to do.

Thanks.

Ade

To: joyce tolliver
From: Jtolliver
Subject: UIC Senate Task Force Response Tripp Umbach Report on UIUC medical School 7_8_14-1
Sent: Thu Jul 10 08:50:22 2014
Importance: Normal

Marked up using iAnnotate on my iPad

From: Joyce Tolliver
Sent: Thursday, July 10, 2014 11:00 AM
To: Matthew B. Wheeler
Subject: UIC "rebuttal"
Attachments: UIC Senate Task Force Response Tripp Umbach Report on UIUC medical School 7_8_14-1 copy.pdf

Matt, just got this this morning. Perhaps you've seen it.

Are you in town?

I think we may need another Friday soirée.

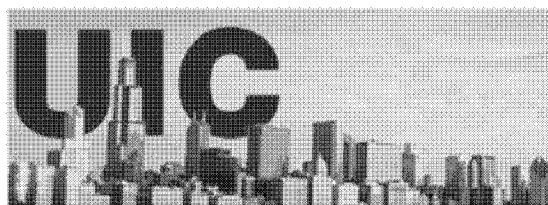
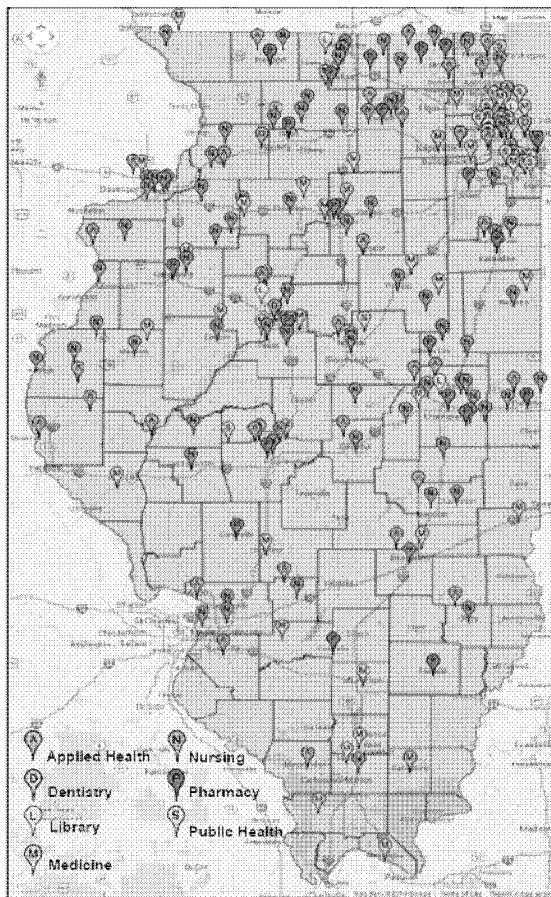
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Joyce Tolliver

UIC FACULTY SENATE TASK FORCE:

TRIPP-UMBACH REPORT

ON UIUC MEDICAL SCHOOL



**The Senate of the
University of Illinois
at Chicago**

UIC FACULTY SENATE TASK FORCE: TRIPP-UMBACH REPORT ON UIUC MEDICAL SCHOOL

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Executive summary

The University of Illinois College of Medicine at Chicago (UIC College of Medicine) is the largest medical school in the nation, and education of medical students through the UIC College of Medicine takes place at four campuses of the University of Illinois (Chicago, Rockford, Peoria and Champaign-Urbana). A study commissioned by Carle Health System and The University of Illinois Foundation resulted in the recommendation of the creation of a new medical school entity to be developed in Champaign-Urbana as a joint public-private venture between Carle Health Systems and the University of Illinois at Champaign-Urbana (UIUC). The scope of the current UIC College of Medicine and its associated Health Sciences Schools (Pharmacy, Dentistry, Nursing, Public Health, Social Work, and Applied Health sciences) is comprehensive and provides a tremendous scope of medical education and healthcare delivery throughout the State of Illinois, a fact which questions the need for, or wisdom of, creating a new medical school entity at UIUC. The Tripp Umbach report on the UIUC proposed medical college provides little concrete financial information regarding the funding to support this initiative. A cursory analysis of the numbers that are provided indicate unsupported and unsubstantiated assumptions that appear to be wholly unrealistic. In the absence of a careful and unbiased analysis, the contribution of the proposed new college of medicine to the local and state economies is overly optimistic, and the actual costs to the State of Illinois are trivialized. Rather than building on the strengths of the current College of Medicine (which includes participation from Chicago, Champaign-Urbana, Peoria and Rockford campuses), the new college, as proposed, will provide little in the way of novelty or synergy, and threatens to undermine the relationships among the campuses that exists under the current structure. The report fails to recognize the current state of the medical education at UIUC as well as the other 3 campuses that comprise the UIC College of Medicine. The focus of the report on the creation of a unique engineering based medical curriculum does not recognize that such a curriculum is possible currently and, in fact, has been implemented within the current UIC College of Medicine structure. If expansion of this engineering-based medical education is truly a need for the people of the State of Illinois, there should be investment in additional development of the University of Illinois (UIC and UIUC) Bioengineering Departments partnerships with the UIC College of Medicine. The rationale put forth by Tripp Umbach to justify the new medical school entity as a means to relieve a projected shortage of physicians indicates a lack of understanding of the current bottleneck in medical education, namely clinical residency positions, which are restricted by limited support from Medicare. In short, the recommendation of Tripp Umbach for a new public-private medical school enterprise is detrimental to the University of Illinois, despite possible benefits to Carle Health System, and resources would be better expended in efforts to strengthen the current Engineering-Medicine relationship to achieve greater benefits for the people of the State of Illinois.

INTRODUCTION

On June 1, 2014 an ad hoc Senate Committee Co-chaired by Mary Jo LaDu, PhD and George T. Kondos, MD was charged with: Soliciting, organizing and generating a response from the University of Illinois faculty to the Tripp Umbach report that focuses on the possible impact on academic, research and clinical efforts. The Tripp Umbach Report evaluates the feasibility of a new college of medicine in Urbana-Champaign. To accomplish the committee's charge the composition of the committee reflected the breadth of the Health Science Colleges (Medicine, Pharmacy, Dentistry, Nursing, Applied Health Sciences, Social Work and Public Health), as well as the College of Engineering and the Library.

The Senate Committee was divided into four task forces:

1. Integration of Health Sciences, Engineering, and Library Programs

Documenting the active, long-standing educational, clinical and research collaborations among the University of Illinois at Chicago's combined Health Science programs, institutions, centers, cores, community organizations and industry partners.

2. Feasibility of the Tripp Umbach Study

Analysis of the statements and conclusions in the Tripp Umbach Report to UIUC Carle Health System April 17, 2014.

3. Creating a Bioengineering Institute

Enhancing engineering-medicine research and physician-engineer training at the University of Illinois.

4. Establishing a Successful MD/PhD Program

Enhancing the MD/PhD Training Program with Cutting-Edge Science and Technology to Advance Patient Care.

1. INTEGRATION OF HEALTH SCIENCE, ENGINEERING AND LIBRARY PROGRAMS

In addressing the Tripp Umbach report, it is important to have a clearer understanding of the diverse components of the current University of Illinois College of Medicine, the other Health Science Colleges, and the vast network of affiliations throughout the State of Illinois and the world.

As the University of Illinois increases its institutional capacity and strategic investment in medical education, bioengineering and related health biotechnologies, **the University of Illinois at Chicago (UIC) is the key to the University's success and innovation in the rapidly changing fields of health care practice, service, research and education.** UIC's health-related research staff, institutional clinical experience, curricular success, and programmatic cooperation between the engineering and health science departments thrives from nearly 30 years of collaborative initiatives. Once the current resources provided by the UIC College of Medicine are examined, it becomes clear that this investment does not need to be recreated through a proposed medical school/private hospital partnership in Urbana-Champaign. It is more appropriate to suggest that the University can seek ways to effectively leverage UIC's current partnerships, collaborations, and education opportunities through the existing partnership with colleagues and colleges at the University of Illinois at Champaign-Urbana (UIUC).

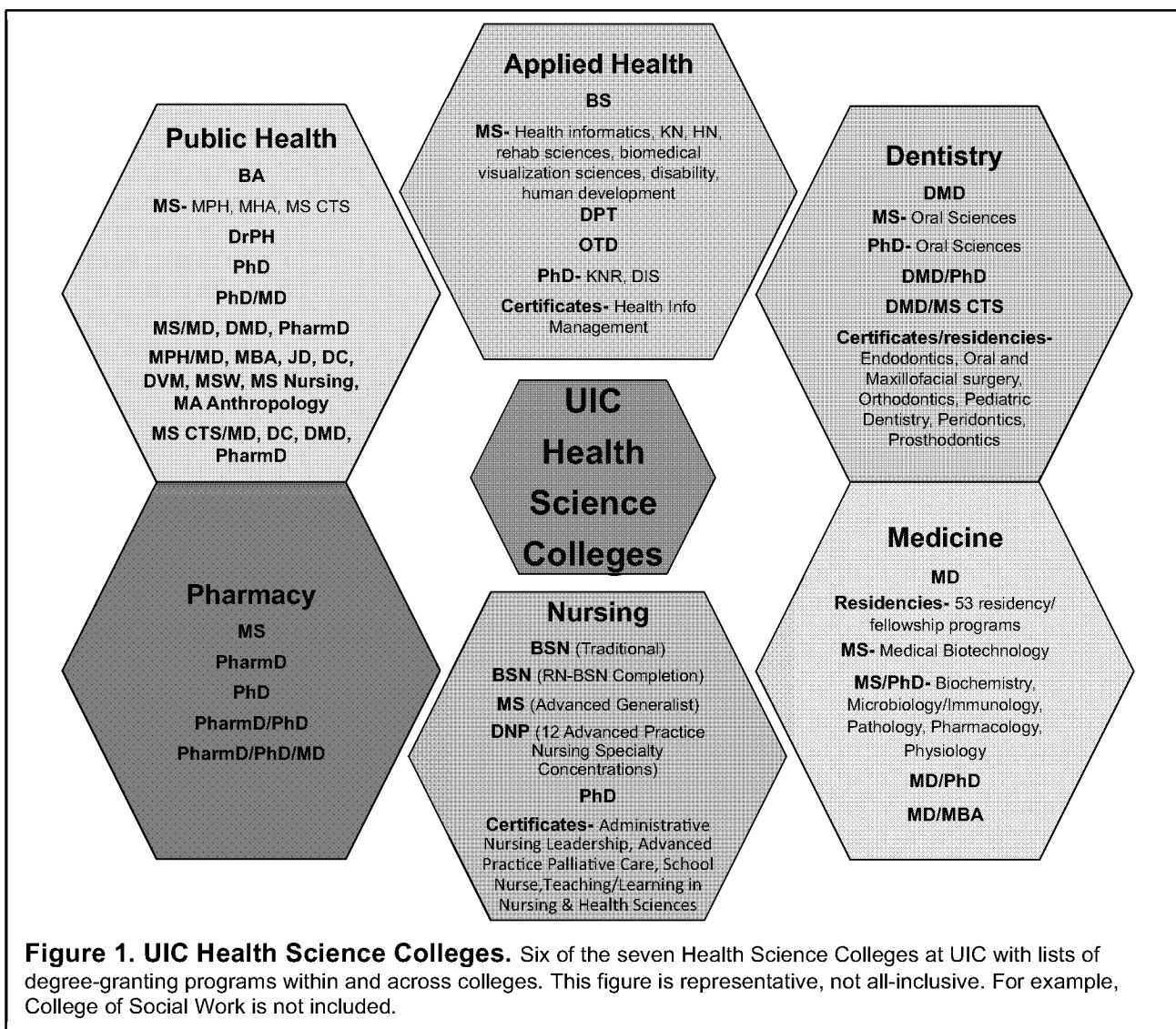


Figure 1. UIC Health Science Colleges. Six of the seven Health Science Colleges at UIC with lists of degree-granting programs within and across colleges. This figure is representative, not all-inclusive. For example, College of Social Work is not included.

UIC is the premiere public university in Illinois for health science education, graduate programs, clinics and centers that support health-related practice and research initiatives. It is part of an extensive regional

complex of hospitals and community clinics. Building on goals established through state legislation, as well as public investments begun in the late 1960s, the University and Illinois Board of Higher Education recognized UIC's central role in meeting the critical need to address the distribution and access to health care and professional education throughout the state. UIC's health science colleges (Applied Health Sciences, Dentistry, Medicine, Nursing, Pharmacy, Public Health, and Social Work) actively support research, education programs, and centers for deliberative clinical and community practice in Peoria, Rockford, Urbana and the Quad Cities (**Figure 1**). These core UIC regional programs collaborate with other specialized centers/programs across the state. This multiplicity of outreach efforts throughout Illinois complements many of the University of Illinois at Springfield's academic departments and programs that focus on the policy, administration, and the legal structure of health care. These University-based regional partnerships are also best appreciated when placed in context with other state university health science programs (**Figure 2**). For instance, Southern Illinois University's programs and practice in many areas of health care and science offers local clinics and extensive education programs throughout the central and southern counties in Illinois. The two main locations for SIU's efforts are in Edwardsville and Springfield.

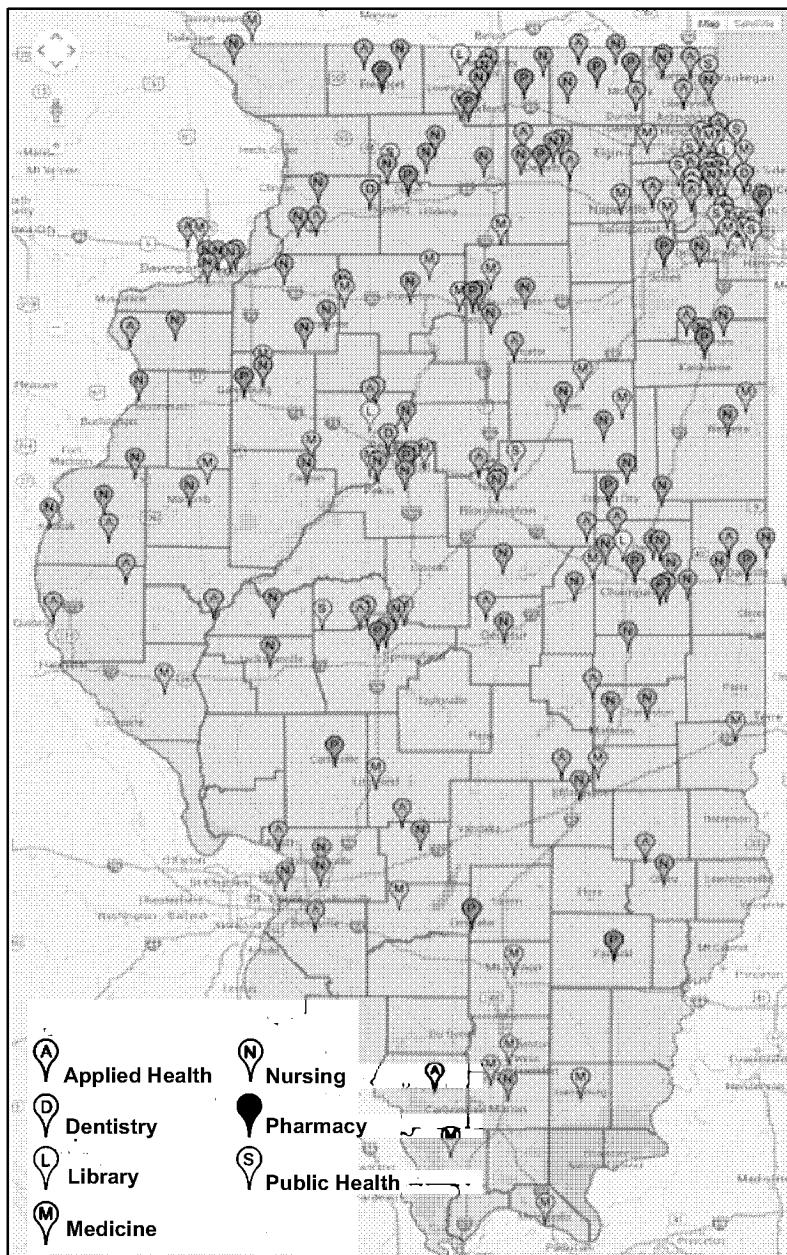
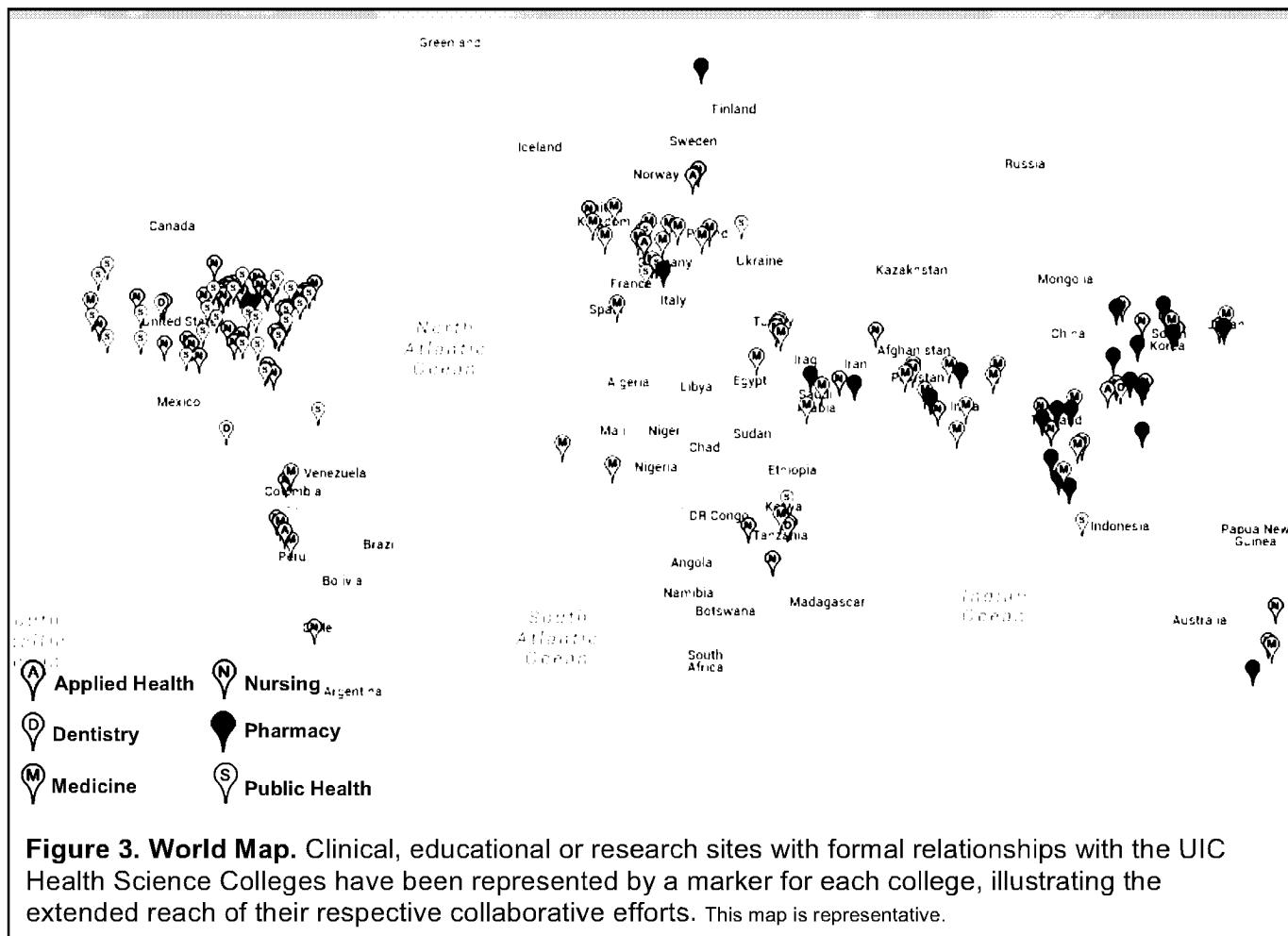


Figure 2. Illinois Map. Clinical, educational or research sites with formal relationships with the UIC Health Science Colleges and Library have been represented by a marker for each college, illustrating the breadth of their respective collaborative efforts. Due to the large number of clinical sites for both Applied Health and Nursing in the Chicago metropolitan area, only one out of 10 sites have been identified. This map is, not all-inclusive.

UIC is also part of the largest medical complex/administrative unit in the United States: the Illinois Medical District. This strengthens UIC's clear leadership in statewide communities of collaboration. The District's legislative goals create institutional structures that foster considerable opportunities for UIC health science programs to invest in critical areas of primary health care delivery and research with diverse patient communities. UIC's several long-standing commitments to interdisciplinary research among the seven colleges of the health sciences and engineering foster discoveries in health related technologies that materially improve future health care delivery mechanisms and practices. Comparable collaborative efforts with communities throughout the greater Chicago Metropolitan area can be found in clinics, offices, and centers that serve populations with limited social, economic or educational resources. Along with UIC's School of Public Health and School of Social work, many clinical practitioners, students, and researchers gain practical experience on how to build healthy communities in many neighborhoods and local areas where access to health care is a challenge. The College of Nursing supports the Institute for Health Care Innovation (IHCI) that actively supports the integration of teaching, practice and research. It is a model entrepre-

neurial business unit within the College that seeks to build partnerships with health care centers through putting into place the best practices of healthcare and financial management, delivered through structured programs of consulting services and educational opportunities.

Additional strengths are drawn from interactions across more than a dozen UIC colleges and centers of research, three other University of Illinois campuses (Rockford, Peoria and Champaign-Urbana), other public and private universities throughout the Chicago region, as well as across the state and the region. This extensive cooperative social and intellectual investment, along with decades of experience, includes recognized international programs that offer health science and engineering students, as well as researchers, many opportunities to combine their education and innovations that focus in particular on the cutting edge of biotechnological developments throughout the Chicago metropolitan area, the state, region, nation and around the world (Figure 3). As an example, the College of Medicine offers its students a wide variety of training options, including an NIH-funded MSTP program to support MD/PhD students, as well as programs focusing on rural-, urban- and global-medicine.



UIC offers other unique advantages and opportunities to serve as the University of Illinois' primary center for health science research, education and practice. Considerable investments have been made to directly support research and learning by combining biotechnology and the health sciences. Current and future UIC medical and engineering students can take an active role within a diverse community of health science scholars and practitioners. These opportunities support many long-standing examples of collaborative work with several global pharmaceutical and biotechnology companies, philanthropic foundations and community health organizations, as well as opportunities to work with other political and thought leaders throughout the state, region, nation and the world. Chicago's dynamic and multicultural environment includes the opportunity to work in dozens of countries through research and practice in areas of medicine, nursing, public health, and

pharmacy. For instance, the World Health Organization recognizes the College of Nursing as a Collaborating Centre for International Nursing Development in Primary Health Care. This is one of four designated WHO Collaborations. The others include the Great Lakes Center for Occupational and Environmental Health, Center for Traditional Medicine, and the Center on the Economics of Tobacco Control. UIC currently partnerships has over 260 different active partnerships with agencies of the federal government, industry and private foundations (see **Table 1** below).

UIC recognizes the strengths of interprofessional education (IPE) among its several health science colleges, the University's office of diversity and the University Library's Library of Health Sciences. In 2008, the Collaborative for Excellence in Interprofessional Education (CEIPE) was created to directly support collaborative research and teaching that reaches outside disciplines, embrace other languages, recognize the importance of cultural contexts, and foster a deliberative context of mutual support, research and education. Comparable programs can be found in individual colleges. This is but one example of an opportunity to deepen the educational experience for Urbana colleagues and students is a possibility the University should consider.

UIC further strengthens its integrated health science research and education through several dynamic University Library programs. With locations in Chicago, Rockford, Peoria, and Urbana, the Library of the Health Sciences (LHS) -- one of the largest health sciences libraries in the nation -- offers a vast multidisciplinary collection. It directly supports the education, research, and clinical practice of the UIC Health Sciences Colleges; the UIC Medical Center Hospital and Outpatient Care Center, and other affiliated health care institutions. LHS provides access to more than 725,000 volumes, 5,200 journals, over 40 clinical tools and biomedical databases, along with such distinguished collections as the History of Nursing and Pharmacy Collection, the Kiefer Collection (urology), the Percival Bailey Library (neurology) and the Nyhus Collection (gastroenterology). The library also integrates its teaching into the curriculum of several of the health science colleges by providing essential information literacy skills for research, clinical practice, and life-long learning. Library faculty offer instructional sessions on how to search and build information management expertise, as well as consultation and advice tailored to the needs of researchers, clinicians, and students. The University Library provides access to an expansive collection of materials in other disciplines through its support of other colleges including Architecture, Design, and the Arts, Business Administration, CUPPA, Education, Engineering, Liberal Arts & Sciences, and Social Work. The multi-disciplinary nature of the University Library facilitates the interdisciplinary research both within and between the UIC colleges. In 1979, the University Library's LHS joined the National Network of Libraries of Medicine (NN/LM) as a Regional Medical Library. It serves the ten-state Greater Midwest Region.

Through its nearly half-century partnership with the Regional College at UIUC, UIC represents the University's best investment for advancing the goal to boost the technological transformation of health care research, practice and education in Illinois. The University of Illinois can take clear advantage of UIC's robust convergence of technological innovations, clinical practice, and industry partnerships among its colleges of medicine, health science and engineering. Long a leader in establishing the standards and practices that materially improve the lives of patients, and the communities they live in, UIC can work with colleagues and students at UIUC to build on the existing investments in these areas.

Table 1: UIC Industry Partnerships

Aastrom Biosciences Inc	Genscape	Ossur hf (Iceland)
Abbott Laboratories	Gilead Sciences	Osuka Pharmaceutical Development Inc
AbbVie, Inc.	GlaxoSmithKline	Outcome Sciences Inc
Acceleron Pharma	GlycoMimetics Inc	Oxford Outcomes
Access Community Health Network	Grifols	Pacira Pharmaceuticals Inc
Actelion Pharmaceuticals Ltd	Guerbet	Parexel Intl Corp
ActoGeniX	Harvard Pilgrim Health Care	Pearson Corp Regulatory & Clinical Research Inst
Advanced Neuromodulation Systems Inc	Harvest Technologies	Penumbra Inc
Advocate Christ Medical Ctr	Healthpoint Biotherapeutics	PepsiCo Inc
Alcon Laboratories Inc	Helsinn	PeriRX
Align Technology	HemaQuest Pharmaceuticals Inc	Pfizer Inc
Allergan Inc	Horizon Therapeutics	PharmaIN
Allos Therapeutics Inc	Hospira Inc	Pheromonicin Biotechnology Lab (PBL)
Amen Gen Inc	Hu-Friedy	Physical Acoustics Corp
Aqualung Therapeutics	ICON Bio Science Inc	Piedra-Sombra Corp Inc
Argos Therapeutics	Icon Clinical Research Inc	Piramal Healthcare Ltd
ARIAD Pharmaceuticals Inc	IGF Oncology	PneumRx
Arrowhead Madison Inc	Ikaria Inc	Positive Outcomes Inc
Astellas Pharma Inc	Immersive Touch Inc	POZEN Inc
AstraZeneca	IN Latino Inst	PPD Development
Asubio Pharmaceuticals Inc	Incuron LLC	PRA Intl
B Braun Medical AG	Indevus Pharmaceuticals	Procter & Gamble Co
BAE Systems	Inflexxion	Purdue Pharma LP
Bank of America	Innovative Neurotronics Inc	QIAGEN Marseille SA
Bausch & Lomb Pharmaceutical	INRange Systems Inc	Quark Pharmaceuticals Inc
Baxter Healthcare Corp	Inst for Clinical Research Inc	Questcor Pharmaceuticals
Biogen Idec	Intelligent Automation Inc	Quintiles
bioMerieux	Intl Technidyne Corp (ITC)	Rand Corp
Biothera	Intuitive Surgical	Regeneron Pharmaceuticals Inc
Blue Cross & Blue Shield of IL	Janssen Therapeutics	REGISTRAT-MAPI
Boehringer Ingelheim	John Snow Inc	Reliant Pharmaceuticals Inc
Boeing Co	Johnson & Johnson (Consumer Products)	Roche Products Ltd
Bombardier Transit Corp	JP Morgan Chase	ROS Technologies
Boston Scientific Corp	Kareus Therapeutics	Rules Based Medicine (RBM)
Brigham & Women Hospital Inc	Knopf Co	Sanofi Recherche
Bristol-Myers Squibb	Knowles Hearing Ctr	Santen Inc
Brookfield Zoo (Chicago Zoological Soc)	Korea Atomic Energy Research Inst	Schering-Plough Corp
B-Vitals	Kraft Foods	Scholastic Inc
C10 Pharma AS	Lavax	SciClone Pharmaceuticals Inc
Cambridge Systematics Inc	Leo Pharma Inc	Scios Inc
Canyon Pharmaceuticals Group	Lexicor Medical Technology Inc	Seaside Therapeutics
Carter Consulting Inc	Lifecell Corp	Second Sight Medical Products, Inc.
CDG Therapeutics Inc	LifeCycle	SGC Pharma Inc
Celgene Corp	LifePharms Inc	Shanghai Sundise Chinese Medicine Co Ltd
Cell Habitats	Lilly USA LLC	Shaw Environmental Inc
Cellerant Therapeutics Inc	LNKChemsolutions	Shell Intl Exploration & Production BV
Cellonis Biotechnologies Co Ltd	Lumiphore	Shionogi & Co Ltd
Central Society of Clinical Research (CSCR)	Luna Innovations	Shire
Centre for Addiction and Mental Health	Lundbeck	Silicon Power Corp
Cephalon Inc	M&P Food Communications	Sirtex
Cerexa	M. Davis & Co., Inc.	Smith & Nephew Fdn
Cerner Corp	Marinus Pharmaceuticals	Smithkline Beecham
Chemonics Intl Inc	Mast Therapeutics	Soligenix, Inc.
Chevron Phillips Chemical Co LLC	McKing Consulting Corp.	Spraying Systems Co
Cinkati Corp	MD Primer	SRI Intl
Cleveland BioLabs Inc	Mead Johnson	St Jude Medical
Cobra Electronics Corp	Medco Health Solutions	St Michael's Hospital
Cobrek Pharmaceuticals Inc	Medicines Co	STAT Analysis Corp
Coloplast Corp	Medimmune Inc	Stryker
Cordis Corp	Medline Industries Inc	Sucampo Pharmaceuticals Inc
Creative Associates Intl	Medtronic Inc	Sunovion Pharmaceuticals Inc
CSL Behring	Mentor Worldwide	Synteract Inc
CTI Clinical Trials and Consulting Services	Merck & Co Inc	Synthes (CMF)
Ctr for Biomedical Testing (CBT)	Merck Sharp & Dohme Corp	Takeda Pharmaceuticals
Ctr for Construction Research & Training (CPWR)	Merz Aesthetics, Inc.	TASC Inc
Cubist Pharmaceuticals	Microbiotix Inc	Tepha
deCODE Genetics	MicroVention	Teva Pharmaceutical
Dell Fdn	Millennium Pharmaceuticals Inc	Theravance Inc
Denali Medical ll	MISTRAS Group Inc	Tolerogenics Inc
Depuy Orthopaedics Inc	Monsanto	Trevena
Depuy Spine	MO-SCI Corp	Trius Therapeutics
DePuy Synthes Spine	Mpx Pharmaceuticals Inc	Tyco Healthcare Group LP
Dr Falk Pharma GmbH	NATCO Pharma Ltd	UCB Biosciences Inc
Draper (Charles Stark) Laboratory Inc	Neumedicines	United BioSource
DRS Technologies	Neurocrine Biosciences, Inc.	United Therapeutics Corp
Eastern Research Group (ERG)	New England Research Institutes	URS Corp
Eisai Inc	Nexus Pharmaceuticals, Inc.	US HIFU LLC (Focus Surgery Inc)
Eli Lilly & Co	Nordion	Vanquish Oncology, Inc.
Emmaus Medical Inc	Northwest Biotherapeutics	Vertex Pharmaceuticals Inc
EMMES Corp	NovaDrug LLC	Vical Inc
Ethicon Endo-Surgery Inc	Novartis Inst for Biomedical Research Inc	Vidasym LLC
Exact Sciences Corp	Novartis Pharmaceuticals Corp	W L Gore & Assoc Inc
Exelixis	Novo Nordisk	Westat
Fisher Bioservices Inc	NovoCare Ltd	Wrightwood Technologies Inc
FivePrime Therapeutics	Omnicare Clinical Research	Wrigley (William) (Jr) Co
Galatea Inc	Oncology Specialists SC	Wyeth Pharmaceuticals
GE Healthcare	Organon Teknika	Yaso Biotechnology Inc
Gem Consortium	OSI Pharmaceuticals	Zimmer Inc
Genentech Inc	Osiris Therapeutics Inc	

2. FEASIBILITY OF THE TRIPP-UMBACH STUDY

The Tripp Umbach (TU) report recommending establishing a specialized, private engineering-focused medical school in Urban Champaign deserves serious consideration. The proposal of a new medical school requires a critical analysis of how the functions of an additional specialized medical school might best be integrated into the state healthcare system, with consideration of its impact on regional healthcare providers, schools of medicine and the population as a whole.

Universities historically have been a home to ‘disruptive innovation,’ a fact that makes them a natural setting for the analysis and implementation of the healthcare needs of the future. The University of Illinois at Chicago (UIC), is ideally suited to undertake such an analysis since it is a regional, state, and national leader in the training of healthcare professionals. UIC has over 80 degree and certificate programs across seven health colleges that provide undergraduate, graduate, and professional training (see above).

As presented, the TU report departs from the conventional academic discourse in that it states the conclusion and makes its recommendations without much of the supporting evidence, methods of analysis and discussion that would be required of even a modest formal analysis. In short, without considering the data, the business plan, memoranda of understanding (MOUs), and the methods of analysis that include more than just UIUC and the region, it is difficult to determine whether the recommendation is in the best interests of not only Carle/UIUC, but the other state medical schools, healthcare providers, and citizens of the region and the state.

Tripp Umbach core competencies and recommendations

It should be noted that the recommendation to build a new medical school, rather than augmenting and supplementing current arrangements, is proposed by a firm that markets itself to Academic Medical Centers as a comprehensive consulting firm that will assist

“From initial studies to legislative hearings and final plans, our team of consultants are [sic] fully engaged with our clients through every step of the process. Tripp Umbach’s senior consultants are nationally recognized medical school deans and administrators, as well as leading architectural and land planning experts who provide accreditation and operational consultation.”

<http://www.trippumbach.com/OurMarkets/AcademicMedicalCenters/tabcid/1764/Default.aspx>

So while Tripp Umbach is an independent consultant in the sense that it is not formally affiliated with either UIUC or Carle Health Sciences, it cannot be called impartial.

Recommendations and Key Findings of the Tripp Umbach report

The TU report includes **six recommendations:** 1) to develop a private, independently-accredited college of medicine (COM); 2) to build on the strengths of the two partners, the COM will focus on translational engineering research, and a diverse team-centered curriculum in a new facility; 3) to expand the capacity of the two partners to ensure sustainability of the COM; 4) to ensure that they have the flexibility to develop and expand multiple external relations to strengthen the founding partners, and to increase the economic impact to the state of Illinois; 5) to ensure that the specialized COM does not duplicate the UIC COM, but instead allows for extensive collaboration; 6) to develop a detailed business plan that includes sustainable funding that does not require General Revenue Funding (GRF) appropriations for medical education. These recommendations are supported by **five key findings:** 1) The State of Illinois lags behind other states in academic medicine, 2) A new college could attract more federal funding, 3) There is urgency for creation of a new medical entity, 4) the new college would require accreditation and should have an innovative curriculum, 5) a new college would have substantial impact on the region and the State of Illinois.

Each of the recommendations are addressed below in a perceived order of importance, rather than the original order of presentation.

Recommendation #6 (most closely linked to Key Finding #5)

We begin with **Recommendation #6** and associated **Key Finding #5**, which is to develop a detailed business plan, and by extension an analysis of the economic impact on UIUC, Carle, and the region. The University of Illinois system has an established structure in the Institute of Government & Public Affairs (IGPA) that provides research-based assessment of issues raised by state and local officials as well as private citizens. The IGPA is staffed by faculty holding academic appointments from all three campuses, and has offices in Champaign and Chicago. For a proposal of this magnitude, a conventional approach would have been to solicit an analysis from the IGPA, since by design it would be a more comprehensive state-wide analysis, without potentials for conflicts of interest.

ECONOMIC IMPACT: In general, for assessment of the economic impact of a second medical school in Urbana there are well-established models such as the REMI model or the IMPLAN model. These models can be applied at various geographic levels. Evaluation of local effects of a new medical school on Champaign and surrounding counties would require estimates for the next 10 years of all the funds that would be invested in buildings and infrastructure, along with new operating funds for the medical school and the surrounding area. That data could then be applied to an analysis of primary industry-specific economic impacts as well as impacts on secondary employment sectors.

It is important to separate *new funds* originating outside the region from *rediverted funds* currently spent in the region. The latter includes all funds transferred within UIUC. The former would consist of private, state and federal funds not currently spent in the region. Evaluation of net state effects should proceed at a higher level of aggregation. Diversion of funds from other areas of the state (for example through new taxes or decreased support of UIC or other institutions of higher education), the effect on other sectors and the larger impact on those geographic areas must be traced and included as costs at the state-level impact study.

Similarly when private funds applied to this initiative are diverted from other uses in the state they must be included as costs in the statewide analysis. A net balance throughout the state should be calculated. At the state level the only real effects arise from funds coming from out of state or funds that would have gone out of state. It is plausible that what might be a net benefit to the region would be a net loss to the state.

Without making explicit the underlying assumptions, the TU report asserts that the economic impact of the existing COM and Medical Center as well as the Proposed COM are as given in table #9 of the TU report, reproduced and augmented with percentage growth in each period here:

Entity	Economic Impact (2012)	Economic Impact (2021)	Economic Impact (2035)
UIC College of Medicine	1,480.00	1,780.00	2,340.00
	2.05%	1.64%	
University of Illinois Medical Center	1,220	1,470	1,900
	1.33%	1.83%	
New Carle/UIUC College of Medicine		160	1,400
			15.49%

The most striking element of the table is that the extant COM and Medical Center are projected to grow at rates of 2% or less over the period 2012 to 2035, while the proposed new COM has an annual growth rate of 15.49% in the period from 2021 when the COM is fully established, to 2035 when it is reckoned to be mature. To understand the phenomenal rate of annual growth, it is necessary to refer to table #7 that is again reproduced and augmented with an additional break-out of percentage growth for the different periods considered:

Table #7 (\$ are expressed in Millions)					
Category of Impact	Existing COM at UIUC (2014)	New COM - 2021 (after start-up)	2030	2035 (Maturity)	
COM Program Impacts	\$26.40	\$83.20	\$210.50	\$390	
		16.40%	10.31%	12.33%	11.03%
					12.82%
Research Program (inc in COM Program Impacts (A))	\$1.80	\$28.40	\$162	\$270	
		39.41%	19.35%	10.22%	16.09%
					23.86%
A-B COM (Non-research)	\$24.60	\$54.80	\$48.50	\$120	
		11.44%	-1.36%	18.12%	5.60%
					7.55%
Clinical Program Impacts	\$5.30	\$16.80	\$60.50	\$120	
		16.48%	14.24%	13.70%	14.04%
					14.86%
Commercialization Impacts	\$7.30	\$60	\$480	\$900.00	
		30.09%	23.10%	12.57%	19.34%
					22.93%
Total Economic Impact	\$39.00	\$160.40	\$750.50	\$1,400	
		20.20%	17.15%	12.47%	15.48%
					17.05%

The combined program in the proposed college (section **A**) is shown to grow by 12.8% between now and 2035, and 11% between 2021 and 2035 (maturity). This includes a non-research component (**A-B**) growing by 7.6% between 2014 and 2035, and 5.6% between 2021 and 2035. The majority of the growth in the

COM is projected to arise from an increase in research dollars (**B**), specifically an annual growth of 23.9% over the extended period, and growth of 16.1% over the 2021 – 2035 period. Most remarkable is the initial growth of 39.4% in the seven-year period between 2014 and 2021. It is unclear whether the growth is due to the relative research activities of the primary faculty in the current UIUC UIC-COM compared to those of primary faculty in the proposed Carle/UIUC COM [five full professors, five assistant professors, 20 clinical research professors], or the rapid growth includes a percentage of revenue based on faculty with primary appointments in the UIUC COE and secondary appointments in the Carle/UIUC COM. Clarity is needed because with the modest number of ten basic science faculty that will be responsible for instructing 150 M1, 50 M2, 50 M3, and 50 M4 medical students by 2021 (300 students total), it is unclear how such a modest number of faculty would be also able to manage a research portfolio with a gross of \$28.4M without including research dollars from associated clinical faculty as well as those in other UIUC colleges. A full 19% of the projected growth to \$1.4B by 2035 is contributed by the growth in research dollars to the new entity, though it remains unclear what percentage of this growth is to be claimed solely by the newly formed Carle/UIUC college, and what fraction should rightly be assigned to the UIUC College of Engineering and other colleges.

Two other categories, Clinical Program (section C), and Commercialization Impacts (section D), are both seen to grow relatively aggressively over the 2014 – 2035 period at rates of 15% and 23% respectively. As all of the assets needed to achieve this theoretical growth rate are currently in place, the report does not explain why the projected growth in these two areas would not be achieved under the current UIC-COM structure. The UIC-COM participates actively with the Office of Technology Management (OTM) to commercialize inventions of the UIC-COM faculty. We mention this because 73% of the growth to \$1.4B is contributed by these two categories, and yet it is still not clear why the creation of a new Carle/UIUC medical school is necessary to achieve this growth.

Based on this analysis, we find that only the non-research component of the Carle/UIUC which contributes \$95.4M, or ~7% of the growth to \$1.4B might be a direct result of creation of a new COM. The other components of growth, if achievable, would be possible under the current structure. Indeed, no compelling case has been given as to why these goals would not be more effectively met by the University of Illinois system through a more aggressive coordination of the extant structure.

A major feature of recommendation #6 is that the business plan is to be developed so that the proposed COM and medical education is achieved without use of General Revenue Funds (GRF). It is unclear how a collaborative effort between Carle and UIUC would completely avoid the use of GRF given that its use is imbedded in virtually every aspect of UIUC function. Consider three examples:

The first example is the university library system that is necessary for accreditation of the proposed Carle/UIUC COM. Does the consortium plan create a parallel library to cover both engineering and medicine, or do they plan to fairly compensate the taxpayers (GRF) for the subscriptions to both physical and electronic access to engineering and medical books and journals, as well as the physical infrastructure and employees of the UIUC library system?

Second, given the F&A rate of 55% that was implicit in section B of table 7 (in their notes about actual expenses), how does the proposed COM intend to make up the revenue necessary to support a gross portfolio of \$270M by 2035? Research with F&A of less than 95 – 100% generally requires supplemental support from the institution; the shortfall inherent in a low F & A rate can be made up in one of four ways: increased tuition, increased traffic to the medical center, licensing of intellectual property generated by the faculty, and development activities (fund raising). For the individual faculty with RO1 research grants, the money can only be recovered if they capitalize on the initial funding, and aggregate these to leverage training grants or program project grants. Any shortfalls not made up in one of these six areas are, in practice, covered by the state appropriation *i.e.* the GRF. Since the report does not speak to how these options will be used to cover the short-fall generated by the increased NIH revenue, the default solution would require use of GRFs.

As a third example, costs will be accrued in expanding the engineering-focused MSP component, which is proposed to be increased from 25 to 50 positions/year over the course of six years, while continuing to train 100 M1 students from the UIC-COM. Of concern is that for the Carle/UIUC COM to provide training to the UIC-COM M1 cohort (that will be distributed to Peoria and Rockford for the M2 – M4 years), they will have to comply with the components and objectives of the UIC-COM curriculum as licensed by the LCME. Education

of the UIC-COM will necessitate use of shared resources funded by the State of Illinois GRF, and we assume that they are asserting the training of the final cohort of 50 M1 MSP would not require GRF, which would depart from the current support of 25 M1 MSP students through the UIUC/UIC-COM that is partially funded by the GRF.

In summary, the lack of a business plan, cloudy information regarding financial sustainability and unsubstantiated assumptions throughout the report make it difficult to accept the financial feasibility of the medical school proposed in the Tripp Umbach report.

Recommendation #2 (most closely linked to Key Finding #3)

Consideration of **Recommendation #2**, to build on the strengths of the two partners, the COM will focus on translational engineering research and a diverse team-centered curriculum in a new facility.

Consideration of **Recommendation #2 and Key Finding #3**, to build on the strengths of the two partners, the COM will focus on translational engineering research and a diverse team-centered curriculum in a new facility. We concern ourselves primarily with UIUC and its relationship with the UIC-COM. Since 1971 the UIUC colleges have had an integrated Medical Scholars Program (MSP) with the UIC-COM. This extensive joint history makes the recommendation for Carle/UIUC unlike the context for the *de novo* partnership that Tripp Umbach recommended for the Carillion Health System and Virginia Tech (cited in the TU UIUC report).

Currently the MSP admits 25 M1s, and has 113 students enrolled in graduate departments across the university. Typically these students have an initial year in their graduate programs, and the medical curriculum is interspersed in a decompressed fashion over the course of subsequent years, mixing both graduate and medical curricula. Program distribution of the current students is given in the table, 100 of whom are in STEM disciplines.

Two points should be noted. The first is that the TU report claims a revolutionary approach of combining engineering with medicine. When one compares their recommendation to the current MSP distribution, the whitepaper is actually recommending a rather modest increase in the *proportion* of students matriculating into the engineering components of the STEM disciplines. But they admit that in future years as the program matures there will be admission into fields not dissimilar from those in which the current students are enrolled. One imagines that to the extent that great benefit will accrue by increased collaboration between the UIUC engineering faculty and the UIC-COM, we whole-heartedly support the recommendation that the university system capitalize on the strengths currently found on all campuses.

In addition, Tripp Umbach suggests that a new medical college is needed to advance medical education. Specifically, the report states, "Tripp Umbach does not believe that developing a LCME-approved "track" of the existing state-supported UIC College of Medicine program can effectively accomplish what a separately accredited program could achieve, especially as the new program will have a high degree of integration with

MSP Graduate Programs		#	Program	#
Agricultural Economics	1		Electrical & Computer Engineering	1
Anthropology	1		Entomology	1
Biochemistry	12		Fellow	2
Bioengineering	17		History	1
Biophysics	2		Human & Community Development	3
Cell & Developmental Biology	4		Kinesiology	1
Chemical Engineering	2		Law	1
Chemistry	5		Microbiology	10
Communications Research	1		Molecular & Integrative Physiology	10
Community Health	1		Neuroscience	25
Comparative Biosciences	1		Nutritional Sciences	3
Comparative Literature	1		Physics	2
East Asian Languages and Cultures	1		Sociology	4

science and technology programs in Urbana-Champaign" (page 33 of the report). Firstly, this statement is in direct opposition to the facts that integrated training of MD/PhD students with a focus in Engineering or Biomedical Engineering is already in existence at UIC and UIUC. Secondly, the implication that the current model of medical education in the University of Illinois is stagnating is contradicted by the tremendous effort made (especially in the last five years) through the actions of the Department of Medical Education at UIC and the combined four campuses (Chicago, Rockford, Peoria and Champaign-Urbana) to modernize and coordinate the delivery of medical education.

Of great concern is the argument supporting the formation of the Carle/UIUC COM that is inherent in **Key Finding #3: Carle Health System and the University of Illinois at Urbana-Champaign must move quickly to capitalize on the benefit of this revolutionary college of medicine model**. The urgency expressed for the establishment of a new medical education enterprise by Tripp Umbach is not well supported by the facts. After noting that the University of Illinois at Champaign-Urbana has one of the country's premier engineering faculty and a School of Engineering that is one of, if not the top school in the nation, Tripp Umbach states "The window for the University of Illinois at Urbana-Champaign will not remain open for long, as **top-tier expertise in engineering**, the key link in this transformation, **can be purchased by all top-tier medical schools and hospital systems.**" (page 32 of the report, bolding added). It is inconceivable that the talent the University of Illinois as assembled over decades could be accurately emulated through wholesale purchase. This statement should be insulting to the superb faculty at UIUC. In addition, it is unclear what "threats" would occur over time to undermine the benefits of the new college of medicine to the citizens of the State of Illinois. On the other hand, a rush to create a new public-private medical education entity at UIUC could undermine existing structures and could threaten the fiscal well-being of the citizens of Illinois. It should be noted that the new Dell Medical School (cited as a threat to the new medical enterprise in the TU report) will be funded from a variety of sources:

"An extraordinary commitment of resources has already been made to enable the development and success of the Dell Medical School. Seton Healthcare expects to invest **\$250 million** towards the establishment of the teaching hospital. Central Health will leverage a recent publicly approved real estate levy with federal matching funds to provide **\$35 million in annual revenues** to the project. The University of Texas System Board of Regents has pledged at least **\$25 million annually** plus an **additional \$5 million per year for eight years**, for faculty recruitment and support. Finally, the **Michael & Susan Dell Foundation recently announced a \$50 million gift to the school.**"

[\(bolding added\)](http://www.wittkieffer.com/file/Dell%20Medical%20School%20Dean.pdf)

As noted in the UIUC Tripp Umbach report, the Dell Medical School plans to accept its first class in 2016. If an urgent threat exists, then the delay necessitated by the logistics of the plan proposed by TU would put this enterprise at additional imminent risk. A more efficient plan would include additional efforts to support collaborations between the UIC College of Medicine and the College of Engineering at UIUC.

Recommendation #5

With respect to the relationship of the new college with the UIC College of Medicine, little that is of benefit to UIUC and the State of Illinois would be provided by the new medical enterprise that is not already available within the current structure. Elsewhere in this document (above in section 1), the numerous interactions of the UIC College of Medicine with the other campuses of the University of Illinois are detailed. The report suggests that interaction with the new medical enterprise would help the UIC College of Medicine "establish itself as a national leader in for addressing issues related to diversity in the health care industry and the delivery of urban health care services with an emphasis on addressing the needs of minority populations", a position that the current UIC College of Medicine *already holds*. The current College of Medicine is already leveraging numerous new technologies, including those developed internally in Chicago and at UIUC, so this recommendation by Tripp Umbach, while stamping a seal of approval on the current system, does not support the development of a new medical school.

Please refer to section 1 above for elaboration on the relationship of the UIC College of Medicine with the rest of the University of Illinois system and the delivery of healthcare and health education across the State of Illinois.

Recommendation #4

The report recommends that the new medical college enterprise proposed by Tripp Umbach have flexibility to develop and expand multiple relationships with other health care, education, and industry partners. Under the current system, UIUC is already collaborating with the Mayo Clinic and numerous other established health care entities. No advantage of the proposed medical school entity is offered by the report. What is not stated is the potential impact of a formalized enterprise between UIUC and the Carle Health System on these outside interactions with esteemed health systems across the country, as re-direction of effort and resources may detrimentally affect the ability of faculty of UIUC to maintain ongoing collaborations.

The report proclaims a need for a new medical school to foster collaborations among the faculty of the new school, the existing UIUC faculty, and investigators throughout the nation. The report accurately notes that, "The Illinois Medical District (IMD), University of Chicago, Northwestern University, UIC College of Medicine, and Loyola University, along with Chicago-based investments in technology infrastructure, have created the foundation for the state to become the national leader in medical innovation and technology" (page 25) but then suggests that "The new college of medicine in Urbana-Champaign will further solidify Illinois' position" (page 25) without recognizing that Chicago contains a unique concentration of medical centers in the state that promotes innovation and synergy. A new college of medicine 140 miles away is unlikely to participate in this synergy without the mechanisms that currently allow faculty at the University of Illinois to interact with any medical center throughout the nation.

As the report states, "Academic medical centers are currently collaborating with the University of Illinois at Urbana-Champaign because of its engineering and technology expertise" (page 25). As the report states, "Colleges of Medicine at Stanford University, Johns Hopkins University, Washington University, Duke University, and Vanderbilt University—all top 10 medical schools as ranked by the National Institutes of Health (NIH) funding—have developed ongoing research collaborations with University of Illinois at Urbana-Champaign engineering and/or science faculty" (page 25). Because of current collaborations ongoing with world-class medical centers, UIUC has no need for an additional medical school to enable local collaborations; Recommendation 4, therefore, does not credibly justify a new college of medicine entity in Champaign-Urbana.

Recommendation #1 and #3

These recommendations together suggest that a new college of medicine that is a joint enterprise between Carle Health Systems and UIUC be created, be focused on collaborative medicine and engineering, and suggest the staffing needed to initiate such a school. Because of the flaws, misrepresentations and lack of information described above, the fundamental assumptions underlying these recommendations are difficult to evaluate positively. The report states, "This unique public-private medical school, organized as a private entity, has the advantage of shared governance and risk, as well as the flexibility to add multiple partners and adapt to rapid changes in health care, education, and science." What part of the risk will be taken on by the University and what portion of the advantage will be taken by Carle is left undefined. Few impediments restrict the ability of the faculty at UIUC to collaborate widely. The governance is envisioned by Tripp Umbach as a private Board of Directors with inclusion of University of Illinois administrators as a minority; it is unclear the influence that will be able to be exerted by the University of Illinois in defining the direction of this new medical enterprise. It is telling that while numerous individuals from The University of Illinois Champaign-Urbana and Carle Health Systems were interviewed in the preparation of this report, only 2 regional Deans (Peoria and Chicago) were interviewed (Appendix A of the report).

The involvement of Carle is problematic, as Carle does not currently have a working relationship with the University of Illinois Hospital; "The care that the Carle Health System cannot provide is transferred to top health care centers regionally, such as Mayo Rochester, Washington University in St. Louis, and Northwestern in Chicago" (page 45). If there really were a commitment of Carle to increasing the quality of medical care and medical education in the State of Illinois, why has Carle failed to involve the Chicago campus at UIC in its medical mission?

Part of the underlying rational for creation of additional medical schools is the need for more physicians in the US. As described below in section 4, the key to increasing the physicians is not increasing the

enrollment for undergraduate medical education, but increasing residency positions. These positions are limited as the underwriting of GME slots has been restricted by the US Congress. The bottleneck is not in undergraduate medical education, but in graduate medical education because of loss of congressional funding.

3. A BIOMEDICAL ENGINEERING INSTITUTE FOR THE UI SYSTEM

The Tripp Umbach (TU) report emphasizes the urgent need for immediate and greater emphasis in the area of biomedical engineering research and physician-engineer training. We absolutely agree with the report that strengthening ties between Medicine and Engineering can bring substantial benefits to the University of Illinois and Illinois in general. We also agree that additional federal funding can be tapped, especially from NIH, by fostering further collaboration between Health Sciences and Engineering. However, we strongly disagree with the premise of the TU report that the best option to do so is to establish a new medical school in Urbana as this ignores three critical facts:

1. In the same way that Engineering at UIUC is top ranked nationally, UIC is a national leader in Health Sciences. Starting with Colleges of Nursing and Pharmacy and the School of Public Health that are all ranked in the top 20, having access to a large and diverse patient base, being a national leader in minority health research, to being one of the world's leading sites for training in and applications of robotic surgery, UIC Health is the logical partner in any further expansion of biomedical engineering training and research. Especially since biomedical engineering research cannot be confined to the College of Medicine and needs to include other Health Science colleges.
2. Historically, biomedical engineering research programs are located on the medical campus, not the engineering campus, since clinical practice severely limits time availability of physicians and other medical professionals. This means that the logical site of any such possible expansion is Chicago, especially since it offers easy access to additional medical campuses at the University of Chicago, Northwestern, Loyola and Rush.
3. The TU report does not mention that a vibrant and NIH supported physician-engineer training program exists at UIC, and it fails to note significant successes of the UIC College of Engineering in biomedical engineering research as well as its many links to UI Health. Biomedical Engineering research and training of physician-scientists and physician-engineers has been an integral part of the UIC College of Medicine (COM) for the past half century. These activities have been strengthened over the past 3 years with the formal realignment of the Department of Bioengineering at UIC to be jointly operated by both the Colleges of Engineering and Medicine, which actually brings the department back to its roots, as it was originally founded in 1965 as a graduate program jointly operated between the UI College of Medicine and the UICC College of Engineering. UIC Engineering also has established partnerships and in some cases existing NIH funding with Nursing, Public Health, and Dentistry.

Given the facts above, we believe that the best way to achieve the goals stated in the TU report is to establish a new entity in Chicago that can foster integration of Health Sciences and Engineering. Initiated in 2009 at the same time as realignment of Bioengineering, a plan was established to create a cross-departmental and cross-college "Biomedical Engineering Institute (BEI)" at UIC, that would facilitate and grow biomedical engineering research and teaching collaborations that already exist at UIC between faculty working in several different colleges. This was to be established at the same time that the Department of Bioengineering was realigned in 2011; but limited resources have delayed that implementation. Specifically, in early drafts of the plan to realign Bioengineering, it was stated that: "The Department of Bioengineering will be realigned to be a joint effort under both Engineering and Medicine, and concurrently a new interdisciplinary Biomedical Engineering Institute will be created to stimulate bioengineering and related research between Engineering, Medicine, Pharmacy, Dentistry and Public Health." In later drafts, due to limited resources, it was stated that: "Although not proposed at this time, in the future we may revisit the idea of a campus center or institute in the area of Biomedical Engineering."

The TU report mentions the new Digital Manufacturing and Design Innovation Institute (DMDII), awarded to UI Labs. DMDII is indeed an important potential driver for technology development and economic growth as well as possible resource for further integration of technology into health sciences. UI Labs, and DMDII, are located on the Goose Island in Chicago, and are a model for public-private partnership. A Biomedical Engineering Institute (BEI) located in Chicago could potentially follow a similar model and leverage the know-how and the significant investment of the University of Illinois into the UI Labs.

The TU report can also serve as one of multiple reference sources as we formulate the structure of the Institute at UIC. We can also look at best practices at other top universities that have developed Biomedical Engineering institutes, centers and programs. One such best practice for the University of Illinois would be for the proposed BEI to encompass faculty at both UIC and UIUC. A precedent for such activity was the joint campus research program operated under the Vice President for Research from 2000-2005, but again cancelled due to limited resources. This might leverage engineering, biomedical, veterinary and medical faculty on both campuses.

One possible embodiment for the BEI could include – like the Beckman Institute in Urbana – **a new research facility** in Chicago on the medical campus, or at least in the Illinois Medical District, where approved projects could be begun and proof of concept and *translational* studies could be initiated. This new Chicago-based institute could collaborate closely with or even be an extension of the Beckman Institute. It could be a UI system-wide institute dedicated to the convergence of engineering and medicine in both research and education. Its exact organizational structure could follow best practices of similar institutes at other top-ranked medical schools, which are described below. Its initial membership may be comprised of faculty at UIC or UIUC that have active collaborations spanning Health Sciences and Engineering or Applied Sciences. A diagram indicating the relative participation of faculty at UIC and outside UIC in collaborations with the Bioengineering faculty is illustrated in Figure 4 below.

Summary

- Biomedical engineering research and physician-engineer training should be priorities for the UI System due to their large potential economic impact. A new Biomedical Engineering Institute in Chicago is the best way to leverage UI strengths towards this goal.
- While UIUC has a nationally ranked Engineering school, UIC has nationally ranked programs in Health Sciences, and a rich history of cross-campus collaborations between Health Sciences and UIC Engineering. The realigned UIC Bioengineering Department which is jointly operated by Colleges of Medicine and Engineering is the most recent and highly successful manifestation of such a collaboration.
- UIC has a prominent and visible NIH funded physician-engineer training program which should be a model used for any future expansion.
- The organizational structure of the new Biomedical Engineering Institute should be chosen to break the barriers for collaborations between campuses and between disciplines.

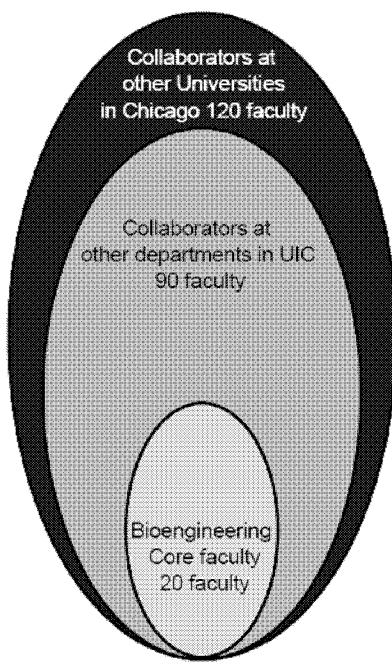


Figure 4: UIC Bioengineering:
Jointly in the Colleges of
Medicine and Engineering

4. ESTABLISHING A SUCCESSFUL MD/PHD PROGRAM

As The Tripp Umbach report justified the proposed new medical enterprise on the basis of an imminent nationwide physician shortage and a desire to attract additional federal biomedical research funding, an analysis was performed on the requirements for additional physicians and the availability of federal research funds. In addition, training of physicians for implementation of cutting-edge current and future technology is addressed by outlining the training opportunities currently available within the UIC College of Medicine, which could be expanded more efficiently than creating a new medical school entity.

The physician shortfall

The United States is currently experiencing a significant shortage of physicians. This shortage is projected to worsen in the coming years because millions of Americans will now have access to health insurance via the Affordable Care Act (ACA) and can afford to regularly see physicians for general health maintenance as well as treatment of acute and chronic diseases that were previously untreated. A recent article published by the leadership of the Association of American Medical Colleges [1] estimates that by 2020, the U.S. will face a shortfall of 45,400 primary care doctors and 46,100 medical specialists unless special measures are taken to ensure additional training of physicians in the US. One of the solutions is to build new medical schools, but as Kirch and colleagues point out [1], an even more effective measure would be to increase opportunities for medical school graduates to enter residency programs because the lack of post-graduate training positions is the most significant bottleneck. Successful completion of a post-graduate residency program is a requirement for certification to practice medicine.

During the past year, 40,394 medical school graduates (those who graduated from US medical schools as well as those who had completed their medical school training in other countries) registered with the NRMP (National Resident Matching Program), but only 25,687 applicants successfully matched into the training programs (<http://www.nrmp.org/wp-content/uploads/2014/03/2014-National-Resident-Matching-Program-NRMP-Main-Residency-Match-Results-Press-Release.pdf>). This means that thousands of physicians who had either completed their medical school in the U.S. or graduates from international medical schools who completed all U.S. eligibility requirements were left without a residency slot. Without completing a U.S. residency, these physicians will not be able to practice medicine and thus cannot contribute to the physician workforce. The main reason for the high number of unmatched applicants is that American residency programs are funded by Medicare and the U.S. Congress enacted a "freeze" on the size of residency training programs in 1997[2]. It is unlikely that building more U.S. medical schools is going to solve the problem of physician shortfall, because once the students graduate from medical school, they will still have to compete for the same number of residency slots.

The most efficient route to addressing the physician short-fall is to increase funding for post-graduate medical training opportunities. Since it is unlikely that Congress will reverse the Medicare "freeze" on residency slots in the near future, sponsorship for such slots by either academic hospitals, foundation or private industry is necessary to pay for the stipends of the trainees. Examples of privately funded training opportunities are already commonplace for advanced training of physicians such as clinical subspecialty fellowships or research fellowships, but private funding of basic residency training is still comparatively rare and offers a great opportunity to rapidly alleviate the severe physician shortfall in the US.

Reduced federal funding for biomedical research

The lack of adequate U.S. government funding for medical residency training is not the only funding crisis in the biomedical enterprise. An equally devastating problem is the diminishing government support for biomedical research. The White House budget for 2015 has not restored the pre-sequester funding levels for the National Institutes of Health (NIH). In fact, current NIH funding is so tight that only 10-20% of biomedical research grant applications are being funded. Researchers now spend an inordinate amount of time re-writing and resubmitting grant applications, hoping that revised grant applications might be funded during subsequent

submission cycles [3]. Since many universities nowadays require faculty and research staff to pay for their salaries from research grants, receiving grant funding has become essential for researchers to ensure a steady paycheck.

Physician scientists are especially vulnerable to diminishing NIH support, because they have to compete for NIH funding with non-physician scientists who can fully devote all their efforts to submitting and re-submitting grant applications. Physician scientists, on the other hand, have to juggle the demands of their clinical work and patient care with the necessity of extensive grant writing. This is a major problem for MD/PhD graduates who were not offered appropriate post-graduate mentoring in their residency and fellowship training that would help them maximize their success for receiving NIH funding. Therefore, the low levels of NIH funding have forced many physician scientists to shut down their research laboratories because they can no longer afford to pay their research staff.

Personalized medicine in the 21st century

One of the central themes of medical advancement in the 21st century is the emergence of personalized and contextualized medicine. Novel technologies such as the increasingly affordable sequencing of an individual's genome and the engineering of high throughput drug testing platforms have provided an unprecedented insight into the biological diversity between humans and how differences in the genome, proteome or even microbiome can affect how distinct patients respond to medical therapies. We are only witnessing the beginning of a medical revolution spear-headed by cutting edge science and engineering, but we are already struggling to understand how we can translate the enormous amount of personalized biomedical data into clinical practice.

While advances in biomedical technology are one key pillar of personalized medicine, we have also become aware of the fact that the socioeconomic and cultural context of an individual patient can have a significant bearing on the prevention, development and treatment of diseases. The American society of the future is projected to become even more urban and more diverse which means that the physicians of the future need to be trained in a manner that allows them to seamlessly treat patients hailing from varied cultural and socioeconomic contexts. Hispanic Americans will undergo the biggest demographic shift in the near future. The US Census bureau estimates that 17% of Americans were of Hispanic origin in 2012, and that by 2060, 31% of Americans will have Hispanic roots. Personalized medicine of the future needs to take this increasing diversity into account, and therefore the development and implementation of novel biomedical technologies should ideally take place in an environment that represents the demographic future of the US. It is noteworthy that the city of Chicago with its diverse urban population represents the ideal environment to train physicians of the future.

Meeting the challenge: Personalized medical education and patient care at UIC

We need to ensure that physicians-in-training learn how to seamlessly transition between delivering high-quality personalized care and also participate in the development or implementation of novel biomedical technologies. At UIC, we believe that the key to this is personalizing medical education to the needs of our medical students and trainees. If we expect the physicians of the future to deliver personalized care, then we need to tailor their medical training in a fashion that allows them to maximally utilize their potential. One such approach is the creation of "pathways" that allow individual trainees to choose how they can best participate in the advancement of patient care.

1. Investigator Pathway

The "**Investigator Pathway**" is ideally suited for physician scientists who want to dedicate most of their future career to biomedical research and developing novel technologies. Most trainees entering this pathway will likely opt for a 7 -8 year combined MD/PhD degree in which they will acquire the basic medical and scientific skills to embark on a physician scientist career. UIC has a successful NIH-funded Medical Scientist Training Program (MSTP) in place that provides students with the support and resources to earn a MD/PhD in a variety of subject areas through collaborative interactions with the Colleges of Medicine, Pharmacy, Public Health, and Engineering. However, their long-term success as physician scientists will strongly depend on their ability to develop post-graduate expertise in niche areas of biomedical research and technology, either in an academic

laboratory or in the biotechnology and pharmaceutical industry. Trainees in the postgraduate “**Investigator Pathway**” will complete all the requirements of postgraduate clinical training to qualify for specialty or subspecialty certification, but will also work closely with established investigators for at least 2-3 years in a research setting. The individualized mentoring by established investigators will help the trainees not only acquire advanced scientific expertise but also learn key grant writing skills (*academic investigator track*) or marketability of developed products (*industry investigator track*) so that they will be highly competitive when they graduate. Such individualized mentoring will ensure long-term success even in an environment of limited research funding. Some departments or sections at the UIC COM such as the Department of Medicine already offer such mentored Investigator Pathways, but this program could potentially be expanded to all departments.

2. Translational Pathway

We recognize that many physicians are highly talented in terms of understanding and using biomedical technology but do not want to invest the extraordinary amount of time required to become a successful independent investigator (7-8 years for initial MD/PHD degree and 5-7- years of postgraduate training in an “**Investigator Pathway**” = 12-15 years of medical and scientific training).

We propose the development of shorter 1-2 year tracks which allow medical students, residents, fellows or even senior physicians to acquire focused biomedical technology skills so that they can easily translate novel biomedical technologies into clinical practice. Examples of such tracks could include training in how to optimally apply personalized genomics or microbiome testing in a clinically meaningful manner or how to develop focused software apps and social media platform to improve communication with patients, training in engineering innovation, user-driven design of medical products, and related engineering design tools, such as 3D printing, and intellectual property issues.

UIC and UIUC already offer a number of combined degree programs allowing medical students to enroll in Masters programs or Masters certificates for such focused training. However, the existing training opportunities could be readily expanded to better integrate cutting-edge science and engineering research into post-graduate medical education (residency/fellowship). Few institutions in the US have recognized the critical importance of post-graduate science and engineering training for physicians. The fact that UIC and UIUC have a proven track record of offering combined degrees, and that UIC has already developed selected post-graduate physician-scientist training programs suggests that a comprehensive University of Illinois physician training program covering the basic sciences, clinical sciences and engineering application is feasible. The comprehensive nature of such a program that provides individualized graduate and post-graduate training of physician-scientists and physician-engineers would be unique in the United States; but it would guarantee that physicians trained at the University of Illinois will continue to be at the forefront of developing and implementing novel biomedical technologies which are likely to have a major impact on patient care in the near future.

References

1. Kirch, D.G., M.K. Henderson, and M.J. Dill, *Physician workforce projections in an era of health care reform*. Annu Rev Med, 2012. **63**: p. 435-45.
2. Iglehart, J.K., *The residency mismatch*. N Engl J Med, 2013. **369**(4): p. 297-9.
3. Alberts, B., et al., *Rescuing US biomedical research from its systemic flaws*. Proc Natl Acad Sci U S A, 2014. **111**(16): p. 5773-7.

Message

From: Illesanmi Adesida [REDACTED]
Sent: 7/10/2014 4:01:41 PM
To: Phyllis Wise [REDACTED]
Subject: Re: Be careful

Phyllis,

Great! and I now have Paul's coordinates from the email above.

I spoke with Christophe today and he is completely on board. He thinks that Bob is slowly making the journey. Bob challenged Paula and co in their last meeting to go find out a real win-win situation for Urbana, or else it is going to be difficult to stop us! I understand that Paula was not happy. Christophe told him also that Dimitry may be getting tired of the whole situation and that he did mention that if Urban got a COM, then UIC has to be compensated! Christophe believes that UIC is just afraid of competition and cannot seem to imagine the future without complaining about Urbana. Any way we need to keep moving ahead.

I will call Paul.

Ade

On Thu, Jul 10, 2014 at 12:32 PM, Phyllis Wise [REDACTED] wrote:
Here you go.

Sent from my iPad

Begin forwarded message:

From: Paul Umbach <PUmbach@trippumbach.com>
Date: July 10, 2014 at 2:39:34 PM GMT+2
To: 'Phyllis Wise' [REDACTED]
Subject: RE: Be careful

Thank you! I typically try to remember using your [REDACTED] and Normand's personal emails. So sorry! I will send a retraction as you suggested. I was just excited about the call and wasn't thinking in your world buy mine. See you for coffee on Tuesday. Paul

Paul O. Umbach
Founder and President
Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: [412.281.2313](tel:412.281.2313)
Cell Number: [REDACTED]
Fax Number: [412.281.9946](tel:412.281.9946)
www.trippumbach.com

"Turning ideas into action for 25 years"

-----Original Message-----

From: Phyllis Wise [[mailto:\[REDACTED\]](mailto:mailto:[REDACTED])]

Sent: Thursday, July 10, 2014 4:33 AM

To: Paul Umbach

Subject: Be careful

Dear Paul,

You may not be used to the "FOIA-everything" atmosphere that we are working in at Illinois. One person, who is clearly crazy and doesn't have real work to do, sent 60+ FOIAs in one day! I am worried about your last email to all of us which states that Christophe is supportive and Bob Easter is secretly supportive. I really don't want Christophe to be put into a compromised position. He is the one person in the University Administration who is thoughtful, intelligent, and has the highest of ethics. I would really recommend that you "recall" your email. I believe that makes it un-FOIAble. We can talk more bout this when we have breakfast next week.

Phyllis

Sent from my iPad

From: Ilesanmi Adesida [REDACTED]
Sent: Thursday, July 10, 2014 4:02 PM
To: Phyllis M Wise
Subject: Re: Response to UIC Senate on COM

Thanks. Tse-tse!

On Thu, Jul 10, 2014 at 3:57 PM, Phyllis M Wise [REDACTED]n> wrote:
Ade,

His email is pumbach@trippumbach.com

His cell phone number is: [REDACTED]

Phyllis

Sent from my iPhone

On Jul 10, 2014, at 10:54 PM, Ilesanmi Adesida [REDACTED]> wrote:

Phyllis,

I don't have Paul's coordinates. Happy to receive them from you.

Ade

On Thu, Jul 10, 2014 at 12:31 PM, Phyllis Wise [REDACTED]n> wrote:
Ade,

You and I are on one page relative to the UIC academic senate report. I agree with everything you said in your second paragraph. It's ridiculous and for us to try to respond to it without saying "what are you smoking" would be really difficult. Although Nick and Joyce may want to respond, I am not sure even their back and forth will do any good. If people ask us about specific aspects we/they can respond.

Paul is supposed to meet in person with [REDACTED]en he visits. I think it would be good for you to call him and tell him about the bee's nest and jealousies in Peoria. It will be hard to satisfy everyone. Do you have his phone number and email?

Phyllis

PS i will forward an email I sent him earlier today about his last email and his response - he withdrew his email.

Sent from my iPad

> On Jul 10, 2014, at 7:08 PM, Ilesanmi Adesida <[REDACTED]> wrote:

>

> Phyllis,

>

> I am replying your email on the UIC Senate's take on the Tripp Umbach Report. I do not support that we (you and I) should be making any official comments or write anything in response to that report. It is an open document that everybody has access to. If our Senate would like to engage their Senate on a "civilized" dialog, I will not object to that. It cannot be adversarial but the Senate can stand its ground with respect to arguments on what is best for the campus. We have to keep it at that level.

>

> I have gone through the report and it is all about UIC. Everything has to be in Chicago since IMD is there and the new BEI, they propose has to be there also. Their claims for the present College of Medicine are outlandish and their view of Carle is jaundiced. I just hope that the Manatt Report will actually state the condition and reputation of Carle objectively.

>

> On another issue, has Paul Umbach talked to [REDACTED] If he has, I hope that he was able to ask some fundamental question about the nature of wanting to be a full partner. What does it mean? And how will the Regional COM there take it? Sarah is mortified about [REDACTED] partnering with us at all not to mention of being a full partner. I am asking this question because it will filter out that we have all these committees working with Carle and not consulting at all with [REDACTED] This is a dilemma!

>

> Ade

From: Matthew Wheeler
Sent: Friday, July 11, 2014 9:56 AM
To: Joyce Tolliver
Subject: Re: UIC "rebuttal"

I am around can you talk today?

On Jul 10, 2014, at 10:59 AM, Joyce Tolliver [REDACTED] wrote:

> Matt, just got this this morning. Perhaps you've seen it.
>
> Are you in town?
>
> I think we may need another Friday soirée.
> --
> Joyce Tolliver
>
>
> <UIC Senate Task Force Response Tripp Umbach Report on UIUC medical School 7_8_14-1 copy.pdf>

To: Jorge Villegas
From: Joyce Tolliver
Subject: Re: Thanks!
Sent: Fri Jul 11 21:39:39 2014
Importance: Normal

Hi Jorge,

I'm so glad you drove to Urbana for the meeting--it was a bonus to get to have a little social time with you and some other friends. You are so dedicated to spend the extra hours driving back and forth!

Here's the report. I hope there is only one!

cheers
Joyce

On Fri, Jul 11, 2014 at 7:32 PM, Jorge Villegas <jvillegas@utexas.edu<mailto:jvillegas@utexas.edu>> wrote:
Hi Joyce

I'm back in beautiful Springfield!

First of all, thanks for treating us our drinks and snack.

Would you mind sending me the UIC report? I want to make sure we have the same document.

Thanks.

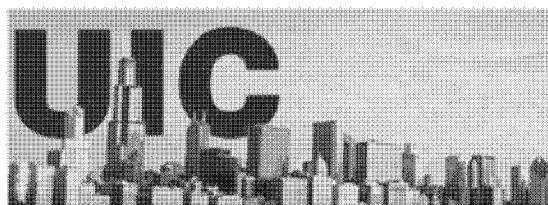
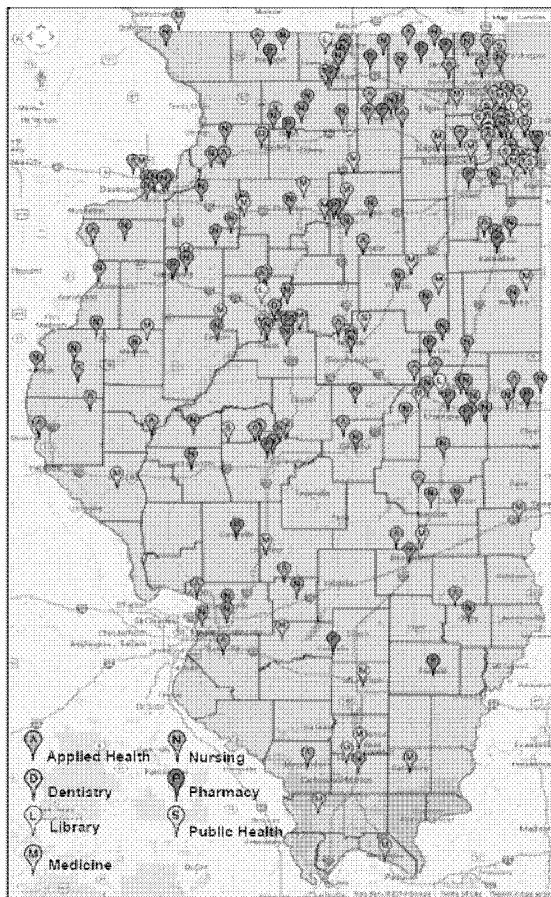
Jorge Villegas

--
Joyce Tolliver

UIC FACULTY SENATE TASK FORCE:

TRIPP-UMBACH REPORT

ON UIUC MEDICAL SCHOOL



**The Senate of the
University of Illinois
at Chicago**

UIC FACULTY SENATE TASK FORCE: TRIPP-UMBACH REPORT ON UIUC MEDICAL SCHOOL

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Milos Zefran mzefran@uic.edu

Professor, Department of Electrical and Computer Engineering

Executive summary

The University of Illinois College of Medicine at Chicago (UIC College of Medicine) is the largest medical school in the nation, and education of medical students through the UIC College of Medicine takes place at four campuses of the University of Illinois (Chicago, Rockford, Peoria and Champaign-Urbana). A study commissioned by Carle Health System and The University of Illinois Foundation resulted in the recommendation of the creation of a new medical school entity to be developed in Champaign-Urbana as a joint public-private venture between Carle Health Systems and the University of Illinois at Champaign-Urbana (UIUC). The scope of the current UIC College of Medicine and its associated Health Sciences Schools (Pharmacy, Dentistry, Nursing, Public Health, Social Work, and Applied Health sciences) is comprehensive and provides a tremendous scope of medical education and healthcare delivery throughout the State of Illinois, a fact which questions the need for, or wisdom of, creating a new medical school entity at UIUC. The Tripp Umbach report on the UIUC proposed medical college provides little concrete financial information regarding the funding to support this initiative. A cursory analysis of the numbers that are provided indicate unsupported and unsubstantiated assumptions that appear to be wholly unrealistic. In the absence of a careful and unbiased analysis, the contribution of the proposed new college of medicine to the local and state economies is overly optimistic, and the actual costs to the State of Illinois are trivialized. Rather than building on the strengths of the current College of Medicine (which includes participation from Chicago, Champaign-Urbana, Peoria and Rockford campuses), the new college, as proposed, will provide little in the way of novelty or synergy, and threatens to undermine the relationships among the campuses that exists under the current structure. The report fails to recognize the current state of the medical education at UIUC as well as the other 3 campuses that comprise the UIC College of Medicine. The focus of the report on the creation of a unique engineering based medical curriculum does not recognize that such a curriculum is possible currently and, in fact, has been implemented within the current UIC College of Medicine structure. If expansion of this engineering-based medical education is truly a need for the people of the State of Illinois, there should be investment in additional development of the University of Illinois (UIC and UIUC) Bioengineering Departments partnerships with the UIC College of Medicine. The rationale put forth by Tripp Umbach to justify the new medical school entity as a means to relieve a projected shortage of physicians indicates a lack of understanding of the current bottleneck in medical education, namely clinical residency positions, which are restricted by limited support from Medicare. In short, the recommendation of Tripp Umbach for a new public-private medical school enterprise is detrimental to the University of Illinois, despite possible benefits to Carle Health System, and resources would be better expended in efforts to strengthen the current Engineering-Medicine relationship to achieve greater benefits for the people of the State of Illinois.

INTRODUCTION

On June 1, 2014 an ad hoc Senate Committee Co-chaired by Mary Jo LaDu, PhD and George T. Kondos, MD was charged with: Soliciting, organizing and generating a response from the University of Illinois faculty to the Tripp Umbach report that focuses on the possible impact on academic, research and clinical efforts. The Tripp Umbach Report evaluates the feasibility of a new college of medicine in Urbana-Champaign. To accomplish the committee's charge the composition of the committee reflected the breadth of the Health Science Colleges (Medicine, Pharmacy, Dentistry, Nursing, Applied Health Sciences, Social Work and Public Health), as well as the College of Engineering and the Library.

The Senate Committee was divided into four task forces:

1. Integration of Health Sciences, Engineering, and Library Programs

Documenting the active, long-standing educational, clinical and research collaborations among the University of Illinois at Chicago's combined Health Science programs, institutions, centers, cores, community organizations and industry partners.

2. Feasibility of the Tripp Umbach Study

Analysis of the statements and conclusions in the Tripp Umbach Report to UIUC Carle Health System April 17, 2014.

3. Creating a Bioengineering Institute

Enhancing engineering-medicine research and physician-engineer training at the University of Illinois.

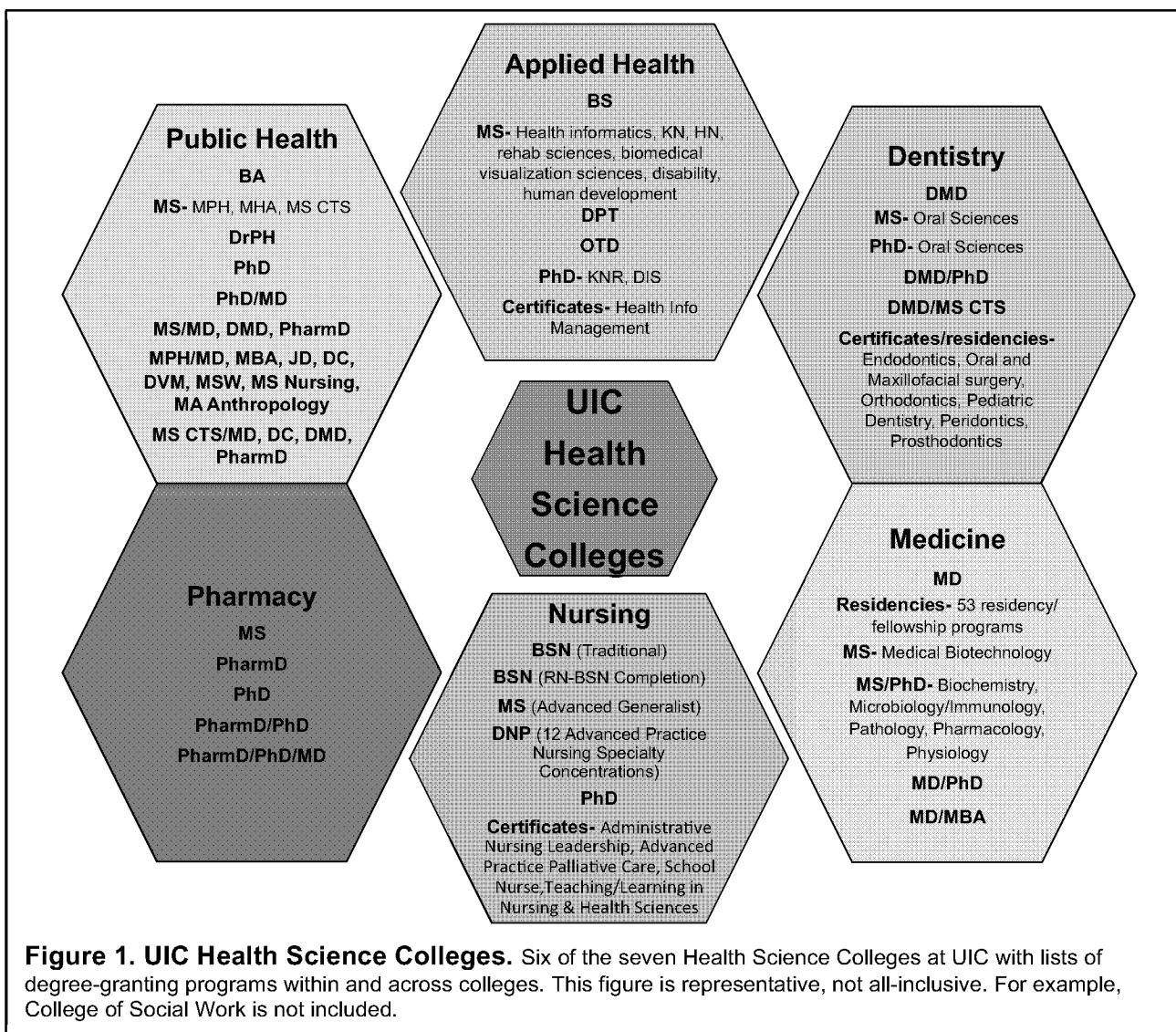
4. Establishing a Successful MD/PhD Program

Enhancing the MD/PhD Training Program with Cutting-Edge Science and Technology to Advance Patient Care.

1. INTEGRATION OF HEALTH SCIENCE, ENGINEERING AND LIBRARY PROGRAMS

In addressing the Tripp Umbach report, it is important to have a clearer understanding of the diverse components of the current University of Illinois College of Medicine, the other Health Science Colleges, and the vast network of affiliations throughout the State of Illinois and the world.

As the University of Illinois increases its institutional capacity and strategic investment in medical education, bioengineering and related health biotechnologies, **the University of Illinois at Chicago (UIC) is the key to the University's success and innovation in the rapidly changing fields of health care practice, service, research and education.** UIC's health-related research staff, institutional clinical experience, curricular success, and programmatic cooperation between the engineering and health science departments thrives from nearly 30 years of collaborative initiatives. Once the current resources provided by the UIC College of Medicine are examined, it becomes clear that this investment does not need to be recreated through a proposed medical school/private hospital partnership in Urbana-Champaign. It is more appropriate to suggest that the University can seek ways to effectively leverage UIC's current partnerships, collaborations, and education opportunities through the existing partnership with colleagues and colleges at the University of Illinois at Champaign-Urbana (UIUC).



UIC is the premiere public university in Illinois for health science education, graduate programs, clinics and centers that support health-related practice and research initiatives. It is part of an extensive regional

complex of hospitals and community clinics. Building on goals established through state legislation, as well as public investments begun in the late 1960s, the University and Illinois Board of Higher Education recognized UIC's central role in meeting the critical need to address the distribution and access to health care and professional education throughout the state. UIC's health science colleges (Applied Health Sciences, Dentistry, Medicine, Nursing, Pharmacy, Public Health, and Social Work) actively support research, education programs, and centers for deliberative clinical and community practice in Peoria, Rockford, Urbana and the Quad Cities (**Figure 1**). These core UIC regional programs collaborate with other specialized centers/programs across the state. This multiplicity of outreach efforts throughout Illinois complements many of the University of Illinois at Springfield's academic departments and programs that focus on the policy, administration, and the legal structure of health care. These University-based regional partnerships are also best appreciated when placed in context with other state university health science programs (**Figure 2**). For instance, Southern Illinois University's programs and practice in many areas of health care and science offers local clinics and extensive education programs throughout the central and southern counties in Illinois. The two main locations for SIU's efforts are in Edwardsville and Springfield.

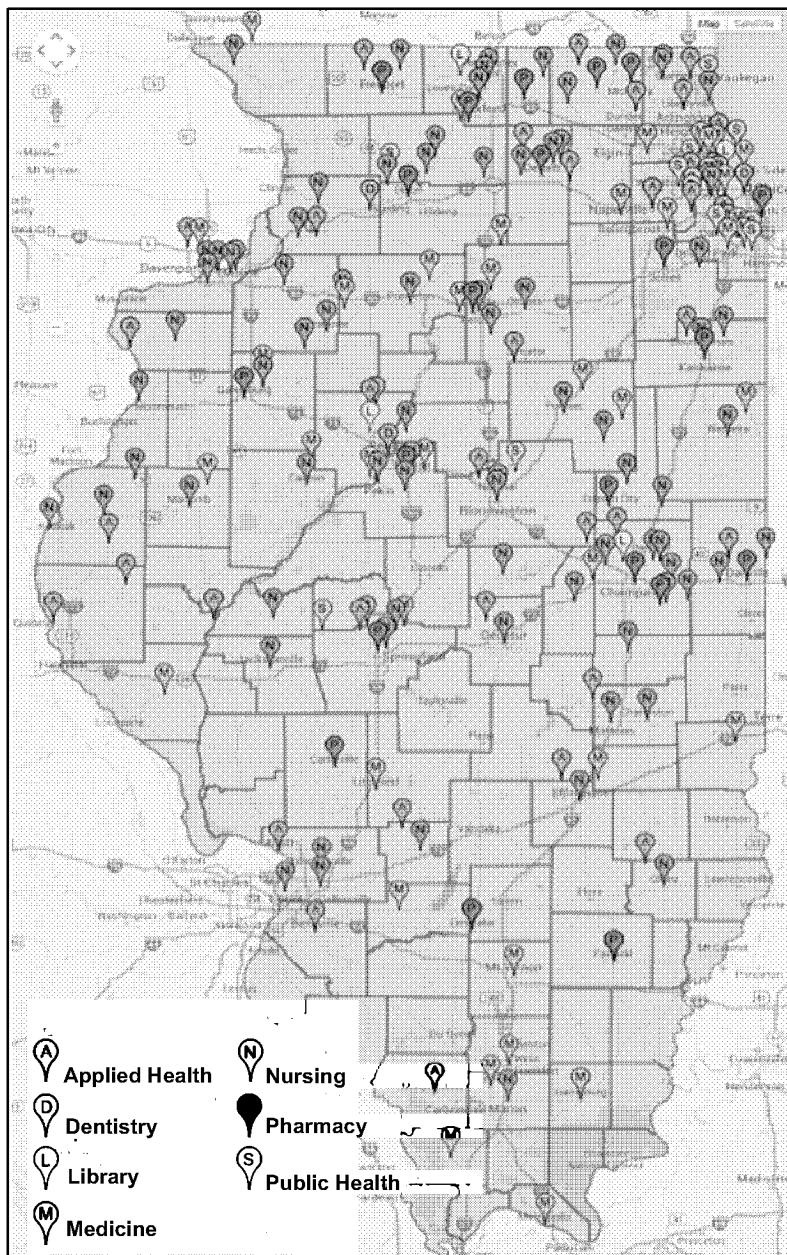
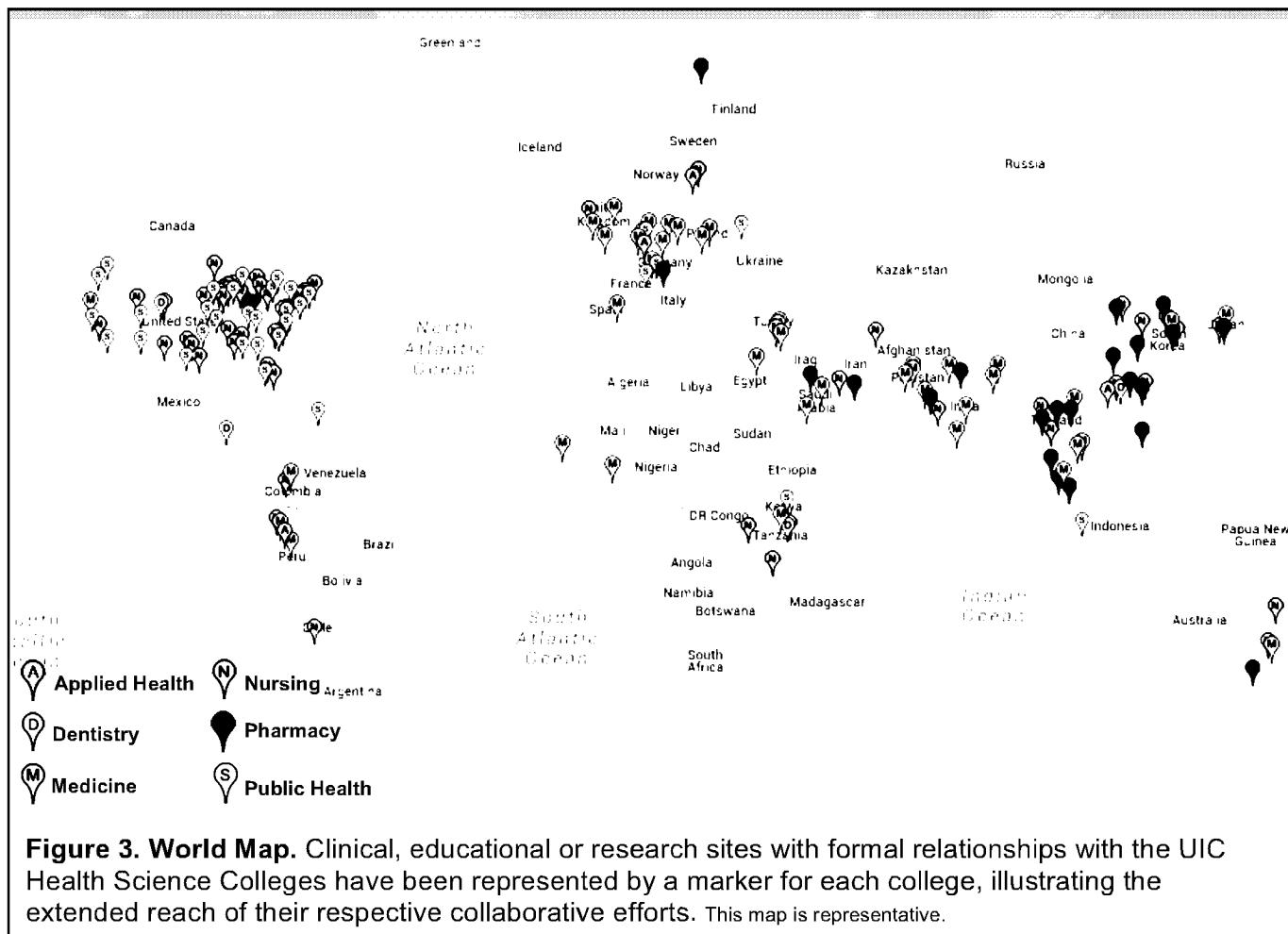


Figure 2. Illinois Map. Clinical, educational or research sites with formal relationships with the UIC Health Science Colleges and Library have been represented by a marker for each college, illustrating the breadth of their respective collaborative efforts. Due to the large number of clinical sites for both Applied Health and Nursing in the Chicago metropolitan area, only one out of 10 sites have been identified. This map is, not all-inclusive.

UIC is also part of the largest medical complex/administrative unit in the United States: the Illinois Medical District. This strengthens UIC's clear leadership in statewide communities of collaboration. The District's legislative goals create institutional structures that foster considerable opportunities for UIC health science programs to invest in critical areas of primary health care delivery and research with diverse patient communities. UIC's several long-standing commitments to interdisciplinary research among the seven colleges of the health sciences and engineering foster discoveries in health related technologies that materially improve future health care delivery mechanisms and practices. Comparable collaborative efforts with communities throughout the greater Chicago Metropolitan area can be found in clinics, offices, and centers that serve populations with limited social, economic or educational resources. Along with UIC's School of Public Health and School of Social work, many clinical practitioners, students, and researchers gain practical experience on how to build healthy communities in many neighborhoods and local areas where access to health care is a challenge. The College of Nursing supports the Institute for Health Care Innovation (IHCI) that actively supports the integration of teaching, practice and research. It is a model entrepre-

neurial business unit within the College that seeks to build partnerships with health care centers through putting into place the best practices of healthcare and financial management, delivered through structured programs of consulting services and educational opportunities.

Additional strengths are drawn from interactions across more than a dozen UIC colleges and centers of research, three other University of Illinois campuses (Rockford, Peoria and Champaign-Urbana), other public and private universities throughout the Chicago region, as well as across the state and the region. This extensive cooperative social and intellectual investment, along with decades of experience, includes recognized international programs that offer health science and engineering students, as well as researchers, many opportunities to combine their education and innovations that focus in particular on the cutting edge of biotechnological developments throughout the Chicago metropolitan area, the state, region, nation and around the world (Figure 3**). As an example, the College of Medicine offers its students a wide variety of training options, including an NIH-funded MSTP program to support MD/PhD students, as well as programs focusing on rural-, urban- and global-medicine.**



UIC offers other unique advantages and opportunities to serve as the University of Illinois' primary center for health science research, education and practice. Considerable investments have been made to directly support research and learning by combining biotechnology and the health sciences. Current and future UIC medical and engineering students can take an active role within a diverse community of health science scholars and practitioners. These opportunities support many long-standing examples of collaborative work with several global pharmaceutical and biotechnology companies, philanthropic foundations and community health organizations, as well as opportunities to work with other political and thought leaders throughout the state, region, nation and the world. Chicago's dynamic and multicultural environment includes the opportunity to work in dozens of countries through research and practice in areas of medicine, nursing, public health, and

pharmacy. For instance, the World Health Organization recognizes the College of Nursing as a Collaborating Centre for International Nursing Development in Primary Health Care. This is one of four designated WHO Collaborations. The others include the Great Lakes Center for Occupational and Environmental Health, Center for Traditional Medicine, and the Center on the Economics of Tobacco Control. UIC currently partnerships has over 260 different active partnerships with agencies of the federal government, industry and private foundations (see **Table 1** below).

UIC recognizes the strengths of interprofessional education (IPE) among its several health science colleges, the University's office of diversity and the University Library's Library of Health Sciences. In 2008, the Collaborative for Excellence in Interprofessional Education (CEIPE) was created to directly support collaborative research and teaching that reaches outside disciplines, embrace other languages, recognize the importance of cultural contexts, and foster a deliberative context of mutual support, research and education. Comparable programs can be found in individual colleges. This is but one example of an opportunity to deepen the educational experience for Urbana colleagues and students is a possibility the University should consider.

UIC further strengthens its integrated health science research and education through several dynamic University Library programs. With locations in Chicago, Rockford, Peoria, and Urbana, the Library of the Health Sciences (LHS) -- one of the largest health sciences libraries in the nation – offers a vast multidisciplinary collection. It directly supports the education, research, and clinical practice of the UIC Health Sciences Colleges; the UIC Medical Center Hospital and Outpatient Care Center, and other affiliated health care institutions. LHS provides access to more than 725,000 volumes, 5,200 journals, over 40 clinical tools and biomedical databases, along with such distinguished collections as the History of Nursing and Pharmacy Collection, the Kiefer Collection (urology), the Percival Bailey Library (neurology) and the Nyhus Collection (gastroenterology). The library also integrates its teaching into the curriculum of several of the health science colleges by providing essential information literacy skills for research, clinical practice, and life-long learning. Library faculty offer instructional sessions on how to search and build information management expertise, as well as consultation and advice tailored to the needs of researchers, clinicians, and students. The University Library provides access to an expansive collection of materials in other disciplines through its support of other colleges including Architecture, Design, and the Arts, Business Administration, CUPPA, Education, Engineering, Liberal Arts & Sciences, and Social Work. The multi-disciplinary nature of the University Library facilitates the interdisciplinary research both within and between the UIC colleges. In 1979, the University Library's LHS joined the National Network of Libraries of Medicine (NN/LM) as a Regional Medical Library. It serves the ten-state Greater Midwest Region.

Through its nearly half-century partnership with the Regional College at UIUC, UIC represents the University's best investment for advancing the goal to boost the technological transformation of health care research, practice and education in Illinois. The University of Illinois can take clear advantage of UIC's robust convergence of technological innovations, clinical practice, and industry partnerships among its colleges of medicine, health science and engineering. Long a leader in establishing the standards and practices that materially improve the lives of patients, and the communities they live in, UIC can work with colleagues and students at UIUC to build on the existing investments in these areas.

Table 1: UIC Industry Partnerships

Aastrom Biosciences Inc	Genscape	Ossur hf (Iceland)
Abbott Laboratories	Gilead Sciences	Osuka Pharmaceutical Development Inc
AbbVie, Inc.	GlaxoSmithKline	Outcome Sciences Inc
Acceleron Pharma	GlycoMimetics Inc	Oxford Outcomes
Access Community Health Network	Grifols	Pacira Pharmaceuticals Inc
Actelion Pharmaceuticals Ltd	Guerbet	Parexel Intl Corp
ActoGeniX	Harvard Pilgrim Health Care	Pearson Corp Regulatory & Clinical Research Inst
Advanced Neuromodulation Systems Inc	Harvest Technologies	Penumbra Inc
Advocate Christ Medical Ctr	Healthpoint Biotherapeutics	PepsiCo Inc
Alcon Laboratories Inc	Helsinn	PeriRX
Align Technology	HemaQuest Pharmaceuticals Inc	Pfizer Inc
Allergan Inc	Horizon Therapeutics	PharmaIN
Allos Therapeutics Inc	Hospira Inc	Pheromonicin Biotechnology Lab (PBL)
Amen Gen Inc	Hu-Friedy	Physical Acoustics Corp
Aqualung Therapeutics	ICON Bio Science Inc	Piedra-Sombra Corp Inc
Argos Therapeutics	Icon Clinical Research Inc	Piramal Healthcare Ltd
ARIAD Pharmaceuticals Inc	IGF Oncology	PneumRx
Arrowhead Madison Inc	Ikaria Inc	Positive Outcomes Inc
Astellas Pharma Inc	Immersive Touch Inc	POZEN Inc
AstraZeneca	IN Latino Inst	PPD Development
Asubio Pharmaceuticals Inc	Incuron LLC	PRA Intl
B Braun Medical AG	Indevus Pharmaceuticals	Procter & Gamble Co
BAE Systems	Inflexxion	Purdue Pharma LP
Bank of America	Innovative Neurotronics Inc	QIAGEN Marseille SA
Bausch & Lomb Pharmaceutical	INRange Systems Inc	Quark Pharmaceuticals Inc
Baxter Healthcare Corp	Inst for Clinical Research Inc	Questcor Pharmaceuticals
Biogen Idec	Intelligent Automation Inc	Quintiles
bioMerieux	Intl Technidyne Corp (ITC)	Rand Corp
Biothera	Intuitive Surgical	Regeneron Pharmaceuticals Inc
Blue Cross & Blue Shield of IL	Janssen Therapeutics	REGISTRAT-MAPI
Boehringer Ingelheim	John Snow Inc	Reliant Pharmaceuticals Inc
Boeing Co	Johnson & Johnson (Consumer Products)	Roche Products Ltd
Bombardier Transit Corp	JP Morgan Chase	ROS Technologies
Boston Scientific Corp	Kareus Therapeutics	Rules Based Medicine (RBM)
Brigham & Women Hospital Inc	Knopf Co	Sanofi Recherche
Bristol-Myers Squibb	Knowles Hearing Ctr	Santen Inc
Brookfield Zoo (Chicago Zoological Soc)	Korea Atomic Energy Research Inst	Schering-Plough Corp
B-Vitals	Kraft Foods	Scholastic Inc
C10 Pharma AS	Lavax	SciClone Pharmaceuticals Inc
Cambridge Systematics Inc	Leo Pharma Inc	Scios Inc
Canyon Pharmaceuticals Group	Lexicor Medical Technology Inc	Seaside Therapeutics
Carter Consulting Inc	Lifecell Corp	Second Sight Medical Products, Inc.
CDG Therapeutics Inc	LifeCycle	SGC Pharma Inc
Celgene Corp	LifePharms Inc	Shanghai Sundise Chinese Medicine Co Ltd
Cell Habitats	Lilly USA LLC	Shaw Environmental Inc
Cellerant Therapeutics Inc	LNKChemsolutions	Shell Intl Exploration & Production BV
Cellonis Biotechnologies Co Ltd	Lumiphore	Shionogi & Co Ltd
Central Society of Clinical Research (CSCR)	Luna Innovations	Shire
Centre for Addiction and Mental Health	Lundbeck	Silicon Power Corp
Cephalon Inc	M&P Food Communications	Sirtex
Cerexa	M. Davis & Co., Inc.	Smith & Nephew Fdn
Cerner Corp	Marinus Pharmaceuticals	Smithkline Beecham
Chemonics Intl Inc	Mast Therapeutics	Soligenix, Inc.
Chevron Phillips Chemical Co LLC	McKing Consulting Corp.	Spraying Systems Co
Cinkati Corp	MD Primer	SRI Intl
Cleveland BioLabs Inc	Mead Johnson	St Jude Medical
Cobra Electronics Corp	Medco Health Solutions	St Michael's Hospital
Cobrek Pharmaceuticals Inc	Medicines Co	STAT Analysis Corp
Coloplast Corp	Medimmune Inc	Stryker
Cordis Corp	Medline Industries Inc	Sucampo Pharmaceuticals Inc
Creative Associates Intl	Medtronic Inc	Sunovion Pharmaceuticals Inc
CSL Behring	Mentor Worldwide	Synteract Inc
CTI Clinical Trials and Consulting Services	Merck & Co Inc	Synthes (CMF)
Ctr for Biomedical Testing (CBT)	Merck Sharp & Dohme Corp	Takeda Pharmaceuticals
Ctr for Construction Research & Training (CPWR)	Merz Aesthetics, Inc.	TASC Inc
Cubist Pharmaceuticals	Microbiotix Inc	Tepha
deCODE Genetics	MicroVention	Teva Pharmaceutical
Dell Fdn	Millennium Pharmaceuticals Inc	Theravance Inc
Denali Medical ll	MISTRAS Group Inc	Tolerogenics Inc
Depuy Orthopaedics Inc	Monsanto	Trevena
Depuy Spine	MO-SCI Corp	Trius Therapeutics
DePuy Synthes Spine	Mpx Pharmaceuticals Inc	Tyco Healthcare Group LP
Dr Falk Pharma GmbH	NATCO Pharma Ltd	UCB Biosciences Inc
Draper (Charles Stark) Laboratory Inc	Neumedicines	United BioSource
DRS Technologies	Neurocrine Biosciences, Inc.	United Therapeutics Corp
Eastern Research Group (ERG)	New England Research Institutes	URS Corp
Eisai Inc	Nexus Pharmaceuticals, Inc.	US HIFU LLC (Focus Surgery Inc)
Eli Lilly & Co	Nordion	Vanquish Oncology, Inc.
Emmaus Medical Inc	Northwest Biotherapeutics	Vertex Pharmaceuticals Inc
EMMES Corp	NovaDrug LLC	Vical Inc
Ethicon Endo-Surgery Inc	Novartis Inst for Biomedical Research Inc	Vidasym LLC
Exact Sciences Corp	Novartis Pharmaceuticals Corp	W L Gore & Assoc Inc
Exelixis	Novo Nordisk	Westat
Fisher Bioservices Inc	NovoCare Ltd	Wrightwood Technologies Inc
FivePrime Therapeutics	Omnicare Clinical Research	Wrigley (William) (Jr) Co
Galatea Inc	Oncology Specialists SC	Wyeth Pharmaceuticals
GE Healthcare	Organon Teknika	Yaso Biotechnology Inc
Gem Consortium	OSI Pharmaceuticals	Zimmer Inc
Genentech Inc	Osiris Therapeutics Inc	

2. FEASIBILITY OF THE TRIPP-UMBACH STUDY

The Tripp Umbach (TU) report recommending establishing a specialized, private engineering-focused medical school in Urban Champaign deserves serious consideration. The proposal of a new medical school requires a critical analysis of how the functions of an additional specialized medical school might best be integrated into the state healthcare system, with consideration of its impact on regional healthcare providers, schools of medicine and the population as a whole.

Universities historically have been a home to ‘disruptive innovation,’ a fact that makes them a natural setting for the analysis and implementation of the healthcare needs of the future. The University of Illinois at Chicago (UIC), is ideally suited to undertake such an analysis since it is a regional, state, and national leader in the training of healthcare professionals. UIC has over 80 degree and certificate programs across seven health colleges that provide undergraduate, graduate, and professional training (see above).

As presented, the TU report departs from the conventional academic discourse in that it states the conclusion and makes its recommendations without much of the supporting evidence, methods of analysis and discussion that would be required of even a modest formal analysis. In short, without considering the data, the business plan, memoranda of understanding (MOUs), and the methods of analysis that include more than just UIUC and the region, it is difficult to determine whether the recommendation is in the best interests of not only Carle/UIUC, but the other state medical schools, healthcare providers, and citizens of the region and the state.

Tripp Umbach core competencies and recommendations

It should be noted that the recommendation to build a new medical school, rather than augmenting and supplementing current arrangements, is proposed by a firm that markets itself to Academic Medical Centers as a comprehensive consulting firm that will assist

“From initial studies to legislative hearings and final plans, our team of consultants are [sic] fully engaged with our clients through every step of the process. Tripp Umbach’s senior consultants are nationally recognized medical school deans and administrators, as well as leading architectural and land planning experts who provide accreditation and operational consultation.”

<http://www.trippumbach.com/OurMarkets/AcademicMedicalCenters/tabcid/1764/Default.aspx>

So while Tripp Umbach is an independent consultant in the sense that it is not formally affiliated with either UIUC or Carle Health Sciences, it cannot be called impartial.

Recommendations and Key Findings of the Tripp Umbach report

The TU report includes **six recommendations:** 1) to develop a private, independently-accredited college of medicine (COM); 2) to build on the strengths of the two partners, the COM will focus on translational engineering research, and a diverse team-centered curriculum in a new facility; 3) to expand the capacity of the two partners to ensure sustainability of the COM; 4) to ensure that they have the flexibility to develop and expand multiple external relations to strengthen the founding partners, and to increase the economic impact to the state of Illinois; 5) to ensure that the specialized COM does not duplicate the UIC COM, but instead allows for extensive collaboration; 6) to develop a detailed business plan that includes sustainable funding that does not require General Revenue Funding (GRF) appropriations for medical education. These recommendations are supported by **five key findings:** 1) The State of Illinois lags behind other states in academic medicine, 2) A new college could attract more federal funding, 3) There is urgency for creation of a new medical entity, 4) the new college would require accreditation and should have an innovative curriculum, 5) a new college would have substantial impact on the region and the State of Illinois.

Each of the recommendations are addressed below in a perceived order of importance, rather than the original order of presentation.

Recommendation #6 (most closely linked to Key Finding #5)

We begin with **Recommendation #6** and associated **Key Finding #5**, which is to develop a detailed business plan, and by extension an analysis of the economic impact on UIUC, Carle, and the region. The University of Illinois system has an established structure in the Institute of Government & Public Affairs (IGPA) that provides research-based assessment of issues raised by state and local officials as well as private citizens. The IGPA is staffed by faculty holding academic appointments from all three campuses, and has offices in Champaign and Chicago. For a proposal of this magnitude, a conventional approach would have been to solicit an analysis from the IGPA, since by design it would be a more comprehensive state-wide analysis, without potentials for conflicts of interest.

ECONOMIC IMPACT: In general, for assessment of the economic impact of a second medical school in Urbana there are well-established models such as the REMI model or the IMPLAN model. These models can be applied at various geographic levels. Evaluation of local effects of a new medical school on Champaign and surrounding counties would require estimates for the next 10 years of all the funds that would be invested in buildings and infrastructure, along with new operating funds for the medical school and the surrounding area. That data could then be applied to an analysis of primary industry-specific economic impacts as well as impacts on secondary employment sectors.

It is important to separate *new funds* originating outside the region from *rediverted funds* currently spent in the region. The latter includes all funds transferred within UIUC. The former would consist of private, state and federal funds not currently spent in the region. Evaluation of net state effects should proceed at a higher level of aggregation. Diversion of funds from other areas of the state (for example through new taxes or decreased support of UIC or other institutions of higher education), the effect on other sectors and the larger impact on those geographic areas must be traced and included as costs at the state-level impact study.

Similarly when private funds applied to this initiative are diverted from other uses in the state they must be included as costs in the statewide analysis. A net balance throughout the state should be calculated. At the state level the only real effects arise from funds coming from out of state or funds that would have gone out of state. It is plausible that what might be a net benefit to the region would be a net loss to the state.

Without making explicit the underlying assumptions, the TU report asserts that the economic impact of the existing COM and Medical Center as well as the Proposed COM are as given in table #9 of the TU report, reproduced and augmented with percentage growth in each period here:

Entity	Economic Impact (2012)	Economic Impact (2021)	Economic Impact (2035)
UIC College of Medicine	1,480.00	1,780.00	2,340.00
	2.05%	1.64%	
University of Illinois Medical Center	1,220	1,470	1,900
	1.33%	1.83%	
New Carle/UIUC College of Medicine		160	1,400
			15.49%

The most striking element of the table is that the extant COM and Medical Center are projected to grow at rates of 2% or less over the period 2012 to 2035, while the proposed new COM has an annual growth rate of 15.49% in the period from 2021 when the COM is fully established, to 2035 when it is reckoned to be mature. To understand the phenomenal rate of annual growth, it is necessary to refer to table #7 that is again reproduced and augmented with an additional break-out of percentage growth for the different periods considered:

Table #7 (\$ are expressed in Millions)					
Category of Impact	Existing COM at UIUC (2014)	New COM - 2021 (after start-up)	2030	2035 (Maturity)	
COM Program Impacts	\$26.40	\$83.20	\$210.50	\$390	
		16.40%	10.31%	12.33%	11.03%
					12.82%
Research Program (inc in COM Program Impacts (A))	\$1.80	\$28.40	\$162	\$270	
		39.41%	19.35%	10.22%	16.09%
					23.86%
A-B COM (Non-research)	\$24.60	\$54.80	\$48.50	\$120	
		11.44%	-1.36%	18.12%	5.60%
					7.55%
Clinical Program Impacts	\$5.30	\$16.80	\$60.50	\$120	
		16.48%	14.24%	13.70%	14.04%
					14.86%
Commercialization Impacts	\$7.30	\$60	\$480	\$900.00	
		30.09%	23.10%	12.57%	19.34%
					22.93%
Total Economic Impact	\$39.00	\$160.40	\$750.50	\$1,400	
		20.20%	17.15%	12.47%	15.48%
					17.05%

The combined program in the proposed college (section **A**) is shown to grow by 12.8% between now and 2035, and 11% between 2021 and 2035 (maturity). This includes a non-research component (**A-B**) growing by 7.6% between 2014 and 2035, and 5.6% between 2021 and 2035. The majority of the growth in the

COM is projected to arise from an increase in research dollars (**B**), specifically an annual growth of 23.9% over the extended period, and growth of 16.1% over the 2021 – 2035 period. Most remarkable is the initial growth of 39.4% in the seven-year period between 2014 and 2021. It is unclear whether the growth is due to the relative research activities of the primary faculty in the current UIUC UIC-COM compared to those of primary faculty in the proposed Carle/UIUC COM [five full professors, five assistant professors, 20 clinical research professors], or the rapid growth includes a percentage of revenue based on faculty with primary appointments in the UIUC COE and secondary appointments in the Carle/UIUC COM. Clarity is needed because with the modest number of ten basic science faculty that will be responsible for instructing 150 M1, 50 M2, 50 M3, and 50 M4 medical students by 2021 (300 students total), it is unclear how such a modest number of faculty would be also able to manage a research portfolio with a gross of \$28.4M without including research dollars from associated clinical faculty as well as those in other UIUC colleges. A full 19% of the projected growth to \$1.4B by 2035 is contributed by the growth in research dollars to the new entity, though it remains unclear what percentage of this growth is to be claimed solely by the newly formed Carle/UIUC college, and what fraction should rightly be assigned to the UIUC College of Engineering and other colleges.

Two other categories, Clinical Program (section C), and Commercialization Impacts (section D), are both seen to grow relatively aggressively over the 2014 – 2035 period at rates of 15% and 23% respectively. As all of the assets needed to achieve this theoretical growth rate are currently in place, the report does not explain why the projected growth in these two areas would not be achieved under the current UIC-COM structure. The UIC-COM participates actively with the Office of Technology Management (OTM) to commercialize inventions of the UIC-COM faculty. We mention this because 73% of the growth to \$1.4B is contributed by these two categories, and yet it is still not clear why the creation of a new Carle/UIUC medical school is necessary to achieve this growth.

Based on this analysis, we find that only the non-research component of the Carle/UIUC which contributes \$95.4M, or ~7% of the growth to \$1.4B might be a direct result of creation of a new COM. The other components of growth, if achievable, would be possible under the current structure. Indeed, no compelling case has been given as to why these goals would not be more effectively met by the University of Illinois system through a more aggressive coordination of the extant structure.

A major feature of recommendation #6 is that the business plan is to be developed so that the proposed COM and medical education is achieved without use of General Revenue Funds (GRF). It is unclear how a collaborative effort between Carle and UIUC would completely avoid the use of GRF given that its use is imbedded in virtually every aspect of UIUC function. Consider three examples:

The first example is the university library system that is necessary for accreditation of the proposed Carle/UIUC COM. Does the consortium plan create a parallel library to cover both engineering and medicine, or do they plan to fairly compensate the taxpayers (GRF) for the subscriptions to both physical and electronic access to engineering and medical books and journals, as well as the physical infrastructure and employees of the UIUC library system?

Second, given the F&A rate of 55% that was implicit in section B of table 7 (in their notes about actual expenses), how does the proposed COM intend to make up the revenue necessary to support a gross portfolio of \$270M by 2035? Research with F&A of less than 95 – 100% generally requires supplemental support from the institution; the shortfall inherent in a low F & A rate can be made up in one of four ways: increased tuition, increased traffic to the medical center, licensing of intellectual property generated by the faculty, and development activities (fund raising). For the individual faculty with RO1 research grants, the money can only be recovered if they capitalize on the initial funding, and aggregate these to leverage training grants or program project grants. Any shortfalls not made up in one of these six areas are, in practice, covered by the state appropriation *i.e.* the GRF. Since the report does not speak to how these options will be used to cover the short-fall generated by the increased NIH revenue, the default solution would require use of GRFs.

As a third example, costs will be accrued in expanding the engineering-focused MSP component, which is proposed to be increased from 25 to 50 positions/year over the course of six years, while continuing to train 100 M1 students from the UIC-COM. Of concern is that for the Carle/UIUC COM to provide training to the UIC-COM M1 cohort (that will be distributed to Peoria and Rockford for the M2 – M4 years), they will have to comply with the components and objectives of the UIC-COM curriculum as licensed by the LCME. Education

of the UIC-COM will necessitate use of shared resources funded by the State of Illinois GRF, and we assume that they are asserting the training of the final cohort of 50 M1 MSP would not require GRF, which would depart from the current support of 25 M1 MSP students through the UIUC/UIC-COM that is partially funded by the GRF.

In summary, the lack of a business plan, cloudy information regarding financial sustainability and unsubstantiated assumptions throughout the report make it difficult to accept the financial feasibility of the medical school proposed in the Tripp Umbach report.

Recommendation #2 (most closely linked to Key Finding #3)

Consideration of **Recommendation #2**, to build on the strengths of the two partners, the COM will focus on translational engineering research and a diverse team-centered curriculum in a new facility.

Consideration of **Recommendation #2 and Key Finding #3**, to build on the strengths of the two partners, the COM will focus on translational engineering research and a diverse team-centered curriculum in a new facility. We concern ourselves primarily with UIUC and its relationship with the UIC-COM. Since 1971 the UIUC colleges have had an integrated Medical Scholars Program (MSP) with the UIC-COM. This extensive joint history makes the recommendation for Carle/UIUC unlike the context for the *de novo* partnership that Tripp Umbach recommended for the Carillion Health System and Virginia Tech (cited in the TU UIUC report).

Currently the MSP admits 25 M1s, and has 113 students enrolled in graduate departments across the university. Typically these students have an initial year in their graduate programs, and the medical curriculum is interspersed in a decompressed fashion over the course of subsequent years, mixing both graduate and medical curricula. Program distribution of the current students is given in the table, 100 of whom are in STEM disciplines.

Two points should be noted. The first is that the TU report claims a revolutionary approach of combining engineering with medicine. When one compares their recommendation to the current MSP distribution, the whitepaper is actually recommending a rather modest increase in the *proportion* of students matriculating into the engineering components of the STEM disciplines. But they admit that in future years as the program matures there will be admission into fields not dissimilar from those in which the current students are enrolled. One imagines that to the extent that great benefit will accrue by increased collaboration between the UIUC engineering faculty and the UIC-COM, we whole-heartedly support the recommendation that the university system capitalize on the strengths currently found on all campuses.

In addition, Tripp Umbach suggests that a new medical college is needed to advance medical education. Specifically, the report states, "Tripp Umbach does not believe that developing a LCME-approved "track" of the existing state-supported UIC College of Medicine program can effectively accomplish what a separately accredited program could achieve, especially as the new program will have a high degree of integration with

MSP Graduate Programs		#	Program	#
Agricultural Economics	1		Electrical & Computer Engineering	1
Anthropology	1		Entomology	1
Biochemistry	12		Fellow	2
Bioengineering	17		History	1
Biophysics	2		Human & Community Development	3
Cell & Developmental Biology	4		Kinesiology	1
Chemical Engineering	2		Law	1
Chemistry	5		Microbiology	10
Communications Research	1		Molecular & Integrative Physiology	10
Community Health	1		Neuroscience	25
Comparative Biosciences	1		Nutritional Sciences	3
Comparative Literature	1		Physics	2
East Asian Languages and Cultures	1		Sociology	4

science and technology programs in Urbana-Champaign" (page 33 of the report). Firstly, this statement is in direct opposition to the facts that integrated training of MD/PhD students with a focus in Engineering or Biomedical Engineering is already in existence at UIC and UIUC. Secondly, the implication that the current model of medical education in the University of Illinois is stagnating is contradicted by the tremendous effort made (especially in the last five years) through the actions of the Department of Medical Education at UIC and the combined four campuses (Chicago, Rockford, Peoria and Champaign-Urbana) to modernize and coordinate the delivery of medical education.

Of great concern is the argument supporting the formation of the Carle/UIUC COM that is inherent in **Key Finding #3: Carle Health System and the University of Illinois at Urbana-Champaign must move quickly to capitalize on the benefit of this revolutionary college of medicine model**. The urgency expressed for the establishment of a new medical education enterprise by Tripp Umbach is not well supported by the facts. After noting that the University of Illinois at Champaign-Urbana has one of the country's premier engineering faculty and a School of Engineering that is one of, if not the top school in the nation, Tripp Umbach states "The window for the University of Illinois at Urbana-Champaign will not remain open for long, as **top-tier expertise in engineering**, the key link in this transformation, **can be purchased by all top-tier medical schools and hospital systems.**" (page 32 of the report, bolding added). It is inconceivable that the talent the University of Illinois as assembled over decades could be accurately emulated through wholesale purchase. This statement should be insulting to the superb faculty at UIUC. In addition, it is unclear what "threats" would occur over time to undermine the benefits of the new college of medicine to the citizens of the State of Illinois. On the other hand, a rush to create a new public-private medical education entity at UIUC could undermine existing structures and could threaten the fiscal well-being of the citizens of Illinois. It should be noted that the new Dell Medical School (cited as a threat to the new medical enterprise in the TU report) will be funded from a variety of sources:

"An extraordinary commitment of resources has already been made to enable the development and success of the Dell Medical School. Seton Healthcare expects to invest **\$250 million** towards the establishment of the teaching hospital. Central Health will leverage a recent publicly approved real estate levy with federal matching funds to provide **\$35 million in annual revenues** to the project. The University of Texas System Board of Regents has pledged at least **\$25 million annually** plus an **additional \$5 million per year for eight years**, for faculty recruitment and support. Finally, the **Michael & Susan Dell Foundation recently announced a \$50 million gift to the school.**"

[\(bolding added\)](http://www.wittkieffer.com/file/Dell%20Medical%20School%20Dean.pdf)

As noted in the UIUC Tripp Umbach report, the Dell Medical School plans to accept its first class in 2016. If an urgent threat exists, then the delay necessitated by the logistics of the plan proposed by TU would put this enterprise at additional imminent risk. A more efficient plan would include additional efforts to support collaborations between the UIC College of Medicine and the College of Engineering at UIUC.

Recommendation #5

With respect to the relationship of the new college with the UIC College of Medicine, little that is of benefit to UIUC and the State of Illinois would be provided by the new medical enterprise that is not already available within the current structure. Elsewhere in this document (above in section 1), the numerous interactions of the UIC College of Medicine with the other campuses of the University of Illinois are detailed. The report suggests that interaction with the new medical enterprise would help the UIC College of Medicine "establish itself as a national leader in for addressing issues related to diversity in the health care industry and the delivery of urban health care services with an emphasis on addressing the needs of minority populations", a position that the current UIC College of Medicine *already holds*. The current College of Medicine is already leveraging numerous new technologies, including those developed internally in Chicago and at UIUC, so this recommendation by Tripp Umbach, while stamping a seal of approval on the current system, does not support the development of a new medical school.

Please refer to section 1 above for elaboration on the relationship of the UIC College of Medicine with the rest of the University of Illinois system and the delivery of healthcare and health education across the State of Illinois.

Recommendation #4

The report recommends that the new medical college enterprise proposed by Tripp Umbach have flexibility to develop and expand multiple relationships with other health care, education, and industry partners. Under the current system, UIUC is already collaborating with the Mayo Clinic and numerous other established health care entities. No advantage of the proposed medical school entity is offered by the report. What is not stated is the potential impact of a formalized enterprise between UIUC and the Carle Health System on these outside interactions with esteemed health systems across the country, as re-direction of effort and resources may detrimentally affect the ability of faculty of UIUC to maintain ongoing collaborations.

The report proclaims a need for a new medical school to foster collaborations among the faculty of the new school, the existing UIUC faculty, and investigators throughout the nation. The report accurately notes that, "The Illinois Medical District (IMD), University of Chicago, Northwestern University, UIC College of Medicine, and Loyola University, along with Chicago-based investments in technology infrastructure, have created the foundation for the state to become the national leader in medical innovation and technology" (page 25) but then suggests that "The new college of medicine in Urbana-Champaign will further solidify Illinois' position" (page 25) without recognizing that Chicago contains a unique concentration of medical centers in the state that promotes innovation and synergy. A new college of medicine 140 miles away is unlikely to participate in this synergy without the mechanisms that currently allow faculty at the University of Illinois to interact with any medical center throughout the nation.

As the report states, "Academic medical centers are currently collaborating with the University of Illinois at Urbana-Champaign because of its engineering and technology expertise" (page 25). As the report states, "Colleges of Medicine at Stanford University, Johns Hopkins University, Washington University, Duke University, and Vanderbilt University—all top 10 medical schools as ranked by the National Institutes of Health (NIH) funding—have developed ongoing research collaborations with University of Illinois at Urbana-Champaign engineering and/or science faculty" (page 25). Because of current collaborations ongoing with world-class medical centers, UIUC has no need for an additional medical school to enable local collaborations; Recommendation 4, therefore, does not credibly justify a new college of medicine entity in Champaign-Urbana.

Recommendation #1 and #3

These recommendations together suggest that a new college of medicine that is a joint enterprise between Carle Health Systems and UIUC be created, be focused on collaborative medicine and engineering, and suggest the staffing needed to initiate such a school. Because of the flaws, misrepresentations and lack of information described above, the fundamental assumptions underlying these recommendations are difficult to evaluate positively. The report states, "This unique public-private medical school, organized as a private entity, has the advantage of shared governance and risk, as well as the flexibility to add multiple partners and adapt to rapid changes in health care, education, and science." What part of the risk will be taken on by the University and what portion of the advantage will be taken by Carle is left undefined. Few impediments restrict the ability of the faculty at UIUC to collaborate widely. The governance is envisioned by Tripp Umbach as a private Board of Directors with inclusion of University of Illinois administrators as a minority; it is unclear the influence that will be able to be exerted by the University of Illinois in defining the direction of this new medical enterprise. It is telling that while numerous individuals from The University of Illinois Champaign-Urbana and Carle Health Systems were interviewed in the preparation of this report, only 2 regional Deans (Peoria and Chicago) were interviewed (Appendix A of the report).

The involvement of Carle is problematic, as Carle does not currently have a working relationship with the University of Illinois Hospital; "The care that the Carle Health System cannot provide is transferred to top health care centers regionally, such as Mayo Rochester, Washington University in St. Louis, and Northwestern in Chicago" (page 45). If there really were a commitment of Carle to increasing the quality of medical care and medical education in the State of Illinois, why has Carle failed to involve the Chicago campus at UIC in its medical mission?

Part of the underlying rational for creation of additional medical schools is the need for more physicians in the US. As described below in section 4, the key to increasing the physicians is not increasing the

enrollment for undergraduate medical education, but increasing residency positions. These positions are limited as the underwriting of GME slots has been restricted by the US Congress. The bottleneck is not in undergraduate medical education, but in graduate medical education because of loss of congressional funding.

3. A BIOMEDICAL ENGINEERING INSTITUTE FOR THE UI SYSTEM

The Tripp Umbach (TU) report emphasizes the urgent need for immediate and greater emphasis in the area of biomedical engineering research and physician-engineer training. We absolutely agree with the report that strengthening ties between Medicine and Engineering can bring substantial benefits to the University of Illinois and Illinois in general. We also agree that additional federal funding can be tapped, especially from NIH, by fostering further collaboration between Health Sciences and Engineering. However, we strongly disagree with the premise of the TU report that the best option to do so is to establish a new medical school in Urbana as this ignores three critical facts:

1. In the same way that Engineering at UIUC is top ranked nationally, UIC is a national leader in Health Sciences. Starting with Colleges of Nursing and Pharmacy and the School of Public Health that are all ranked in the top 20, having access to a large and diverse patient base, being a national leader in minority health research, to being one of the world's leading sites for training in and applications of robotic surgery, UIC Health is the logical partner in any further expansion of biomedical engineering training and research. Especially since biomedical engineering research cannot be confined to the College of Medicine and needs to include other Health Science colleges.
2. Historically, biomedical engineering research programs are located on the medical campus, not the engineering campus, since clinical practice severely limits time availability of physicians and other medical professionals. This means that the logical site of any such possible expansion is Chicago, especially since it offers easy access to additional medical campuses at the University of Chicago, Northwestern, Loyola and Rush.
3. The TU report does not mention that a vibrant and NIH supported physician-engineer training program exists at UIC, and it fails to note significant successes of the UIC College of Engineering in biomedical engineering research as well as its many links to UI Health. Biomedical Engineering research and training of physician-scientists and physician-engineers has been an integral part of the UIC College of Medicine (COM) for the past half century. These activities have been strengthened over the past 3 years with the formal realignment of the Department of Bioengineering at UIC to be jointly operated by both the Colleges of Engineering and Medicine, which actually brings the department back to its roots, as it was originally founded in 1965 as a graduate program jointly operated between the UI College of Medicine and the UICC College of Engineering. UIC Engineering also has established partnerships and in some cases existing NIH funding with Nursing, Public Health, and Dentistry.

Given the facts above, we believe that the best way to achieve the goals stated in the TU report is to establish a new entity in Chicago that can foster integration of Health Sciences and Engineering. Initiated in 2009 at the same time as realignment of Bioengineering, a plan was established to create a cross-departmental and cross-college "Biomedical Engineering Institute (BEI)" at UIC, that would facilitate and grow biomedical engineering research and teaching collaborations that already exist at UIC between faculty working in several different colleges. This was to be established at the same time that the Department of Bioengineering was realigned in 2011; but limited resources have delayed that implementation. Specifically, in early drafts of the plan to realign Bioengineering, it was stated that: "The Department of Bioengineering will be realigned to be a joint effort under both Engineering and Medicine, and concurrently a new interdisciplinary Biomedical Engineering Institute will be created to stimulate bioengineering and related research between Engineering, Medicine, Pharmacy, Dentistry and Public Health." In later drafts, due to limited resources, it was stated that: "Although not proposed at this time, in the future we may revisit the idea of a campus center or institute in the area of Biomedical Engineering."

The TU report mentions the new Digital Manufacturing and Design Innovation Institute (DMDII), awarded to UI Labs. DMDII is indeed an important potential driver for technology development and economic growth as well as possible resource for further integration of technology into health sciences. UI Labs, and DMDII, are located on the Goose Island in Chicago, and are a model for public-private partnership. A Biomedical Engineering Institute (BEI) located in Chicago could potentially follow a similar model and leverage the know-how and the significant investment of the University of Illinois into the UI Labs.

The TU report can also serve as one of multiple reference sources as we formulate the structure of the Institute at UIC. We can also look at best practices at other top universities that have developed Biomedical Engineering institutes, centers and programs. One such best practice for the University of Illinois would be for the proposed BEI to encompass faculty at both UIC and UIUC. A precedent for such activity was the joint campus research program operated under the Vice President for Research from 2000-2005, but again cancelled due to limited resources. This might leverage engineering, biomedical, veterinary and medical faculty on both campuses.

One possible embodiment for the BEI could include – like the Beckman Institute in Urbana – **a new research facility** in Chicago on the medical campus, or at least in the Illinois Medical District, where approved projects could be begun and proof of concept and *translational* studies could be initiated. This new Chicago-based institute could collaborate closely with or even be an extension of the Beckman Institute. It could be a UI system-wide institute dedicated to the convergence of engineering and medicine in both research and education. Its exact organizational structure could follow best practices of similar institutes at other top-ranked medical schools, which are described below. Its initial membership may be comprised of faculty at UIC or UIUC that have active collaborations spanning Health Sciences and Engineering or Applied Sciences. A diagram indicating the relative participation of faculty at UIC and outside UIC in collaborations with the Bioengineering faculty is illustrated in Figure 4 below.

Summary

- Biomedical engineering research and physician-engineer training should be priorities for the UI System due to their large potential economic impact. A new Biomedical Engineering Institute in Chicago is the best way to leverage UI strengths towards this goal.
- While UIUC has a nationally ranked Engineering school, UIC has nationally ranked programs in Health Sciences, and a rich history of cross-campus collaborations between Health Sciences and UIC Engineering. The realigned UIC Bioengineering Department which is jointly operated by Colleges of Medicine and Engineering is the most recent and highly successful manifestation of such a collaboration.
- UIC has a prominent and visible NIH funded physician-engineer training program which should be a model used for any future expansion.
- The organizational structure of the new Biomedical Engineering Institute should be chosen to break the barriers for collaborations between campuses and between disciplines.

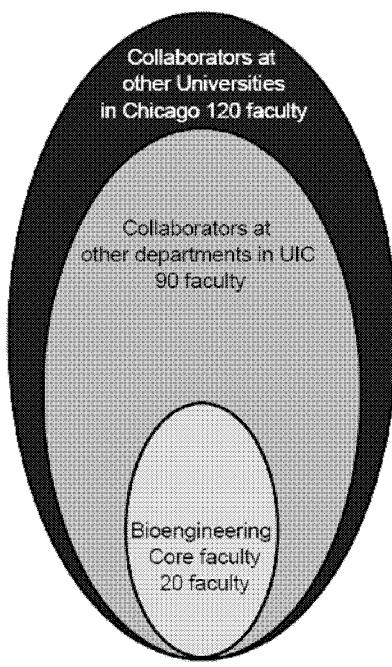


Figure 4: UIC Bioengineering:
Jointly in the Colleges of
Medicine and Engineering

4. ESTABLISHING A SUCCESSFUL MD/PHD PROGRAM

As The Tripp Umbach report justified the proposed new medical enterprise on the basis of an imminent nationwide physician shortage and a desire to attract additional federal biomedical research funding, an analysis was performed on the requirements for additional physicians and the availability of federal research funds. In addition, training of physicians for implementation of cutting-edge current and future technology is addressed by outlining the training opportunities currently available within the UIC College of Medicine, which could be expanded more efficiently than creating a new medical school entity.

The physician shortfall

The United States is currently experiencing a significant shortage of physicians. This shortage is projected to worsen in the coming years because millions of Americans will now have access to health insurance via the Affordable Care Act (ACA) and can afford to regularly see physicians for general health maintenance as well as treatment of acute and chronic diseases that were previously untreated. A recent article published by the leadership of the Association of American Medical Colleges [1] estimates that by 2020, the U.S. will face a shortfall of 45,400 primary care doctors and 46,100 medical specialists unless special measures are taken to ensure additional training of physicians in the US. One of the solutions is to build new medical schools, but as Kirch and colleagues point out [1], an even more effective measure would be to increase opportunities for medical school graduates to enter residency programs because the lack of post-graduate training positions is the most significant bottleneck. Successful completion of a post-graduate residency program is a requirement for certification to practice medicine.

During the past year, 40,394 medical school graduates (those who graduated from US medical schools as well as those who had completed their medical school training in other countries) registered with the NRMP (National Resident Matching Program), but only 25,687 applicants successfully matched into the training programs (<http://www.nrmp.org/wp-content/uploads/2014/03/2014-National-Resident-Matching-Program-NRMP-Main-Residency-Match-Results-Press-Release.pdf>). This means that thousands of physicians who had either completed their medical school in the U.S. or graduates from international medical schools who completed all U.S. eligibility requirements were left without a residency slot. Without completing a U.S. residency, these physicians will not be able to practice medicine and thus cannot contribute to the physician workforce. The main reason for the high number of unmatched applicants is that American residency programs are funded by Medicare and the U.S. Congress enacted a "freeze" on the size of residency training programs in 1997[2]. It is unlikely that building more U.S. medical schools is going to solve the problem of physician shortfall, because once the students graduate from medical school, they will still have to compete for the same number of residency slots.

The most efficient route to addressing the physician short-fall is to increase funding for post-graduate medical training opportunities. Since it is unlikely that Congress will reverse the Medicare "freeze" on residency slots in the near future, sponsorship for such slots by either academic hospitals, foundation or private industry is necessary to pay for the stipends of the trainees. Examples of privately funded training opportunities are already commonplace for advanced training of physicians such as clinical subspecialty fellowships or research fellowships, but private funding of basic residency training is still comparatively rare and offers a great opportunity to rapidly alleviate the severe physician shortfall in the US.

Reduced federal funding for biomedical research

The lack of adequate U.S. government funding for medical residency training is not the only funding crisis in the biomedical enterprise. An equally devastating problem is the diminishing government support for biomedical research. The White House budget for 2015 has not restored the pre-sequester funding levels for the National Institutes of Health (NIH). In fact, current NIH funding is so tight that only 10-20% of biomedical research grant applications are being funded. Researchers now spend an inordinate amount of time re-writing and resubmitting grant applications, hoping that revised grant applications might be funded during subsequent

submission cycles [3]. Since many universities nowadays require faculty and research staff to pay for their salaries from research grants, receiving grant funding has become essential for researchers to ensure a steady paycheck.

Physician scientists are especially vulnerable to diminishing NIH support, because they have to compete for NIH funding with non-physician scientists who can fully devote all their efforts to submitting and re-submitting grant applications. Physician scientists, on the other hand, have to juggle the demands of their clinical work and patient care with the necessity of extensive grant writing. This is a major problem for MD/PhD graduates who were not offered appropriate post-graduate mentoring in their residency and fellowship training that would help them maximize their success for receiving NIH funding. Therefore, the low levels of NIH funding have forced many physician scientists to shut down their research laboratories because they can no longer afford to pay their research staff.

Personalized medicine in the 21st century

One of the central themes of medical advancement in the 21st century is the emergence of personalized and contextualized medicine. Novel technologies such as the increasingly affordable sequencing of an individual's genome and the engineering of high throughput drug testing platforms have provided an unprecedented insight into the biological diversity between humans and how differences in the genome, proteome or even microbiome can affect how distinct patients respond to medical therapies. We are only witnessing the beginning of a medical revolution spear-headed by cutting edge science and engineering, but we are already struggling to understand how we can translate the enormous amount of personalized biomedical data into clinical practice.

While advances in biomedical technology are one key pillar of personalized medicine, we have also become aware of the fact that the socioeconomic and cultural context of an individual patient can have a significant bearing on the prevention, development and treatment of diseases. The American society of the future is projected to become even more urban and more diverse which means that the physicians of the future need to be trained in a manner that allows them to seamlessly treat patients hailing from varied cultural and socioeconomic contexts. Hispanic Americans will undergo the biggest demographic shift in the near future. The US Census bureau estimates that 17% of Americans were of Hispanic origin in 2012, and that by 2060, 31% of Americans will have Hispanic roots. Personalized medicine of the future needs to take this increasing diversity into account, and therefore the development and implementation of novel biomedical technologies should ideally take place in an environment that represents the demographic future of the US. It is noteworthy that the city of Chicago with its diverse urban population represents the ideal environment to train physicians of the future.

Meeting the challenge: Personalized medical education and patient care at UIC

We need to ensure that physicians-in-training learn how to seamlessly transition between delivering high-quality personalized care and also participate in the development or implementation of novel biomedical technologies. At UIC, we believe that the key to this is personalizing medical education to the needs of our medical students and trainees. If we expect the physicians of the future to deliver personalized care, then we need to tailor their medical training in a fashion that allows them to maximally utilize their potential. One such approach is the creation of "pathways" that allow individual trainees to choose how they can best participate in the advancement of patient care.

1. Investigator Pathway

The "**Investigator Pathway**" is ideally suited for physician scientists who want to dedicate most of their future career to biomedical research and developing novel technologies. Most trainees entering this pathway will likely opt for a 7 -8 year combined MD/PhD degree in which they will acquire the basic medical and scientific skills to embark on a physician scientist career. UIC has a successful NIH-funded Medical Scientist Training Program (MSTP) in place that provides students with the support and resources to earn a MD/PhD in a variety of subject areas through collaborative interactions with the Colleges of Medicine, Pharmacy, Public Health, and Engineering. However, their long-term success as physician scientists will strongly depend on their ability to develop post-graduate expertise in niche areas of biomedical research and technology, either in an academic

laboratory or in the biotechnology and pharmaceutical industry. Trainees in the postgraduate “**Investigator Pathway**” will complete all the requirements of postgraduate clinical training to qualify for specialty or subspecialty certification, but will also work closely with established investigators for at least 2-3 years in a research setting. The individualized mentoring by established investigators will help the trainees not only acquire advanced scientific expertise but also learn key grant writing skills (*academic investigator track*) or marketability of developed products (*industry investigator track*) so that they will be highly competitive when they graduate. Such individualized mentoring will ensure long-term success even in an environment of limited research funding. Some departments or sections at the UIC COM such as the Department of Medicine already offer such mentored Investigator Pathways, but this program could potentially be expanded to all departments.

2. Translational Pathway

We recognize that many physicians are highly talented in terms of understanding and using biomedical technology but do not want to invest the extraordinary amount of time required to become a successful independent investigator (7-8 years for initial MD/PHD degree and 5-7- years of postgraduate training in an “**Investigator Pathway**” = 12-15 years of medical and scientific training).

We propose the development of shorter 1-2 year tracks which allow medical students, residents, fellows or even senior physicians to acquire focused biomedical technology skills so that they can easily translate novel biomedical technologies into clinical practice. Examples of such tracks could include training in how to optimally apply personalized genomics or microbiome testing in a clinically meaningful manner or how to develop focused software apps and social media platform to improve communication with patients, training in engineering innovation, user-driven design of medical products, and related engineering design tools, such as 3D printing, and intellectual property issues.

UIC and UIUC already offer a number of combined degree programs allowing medical students to enroll in Masters programs or Masters certificates for such focused training. However, the existing training opportunities could be readily expanded to better integrate cutting-edge science and engineering research into post-graduate medical education (residency/fellowship). Few institutions in the US have recognized the critical importance of post-graduate science and engineering training for physicians. The fact that UIC and UIUC have a proven track record of offering combined degrees, and that UIC has already developed selected post-graduate physician-scientist training programs suggests that a comprehensive University of Illinois physician training program covering the basic sciences, clinical sciences and engineering application is feasible. The comprehensive nature of such a program that provides individualized graduate and post-graduate training of physician-scientists and physician-engineers would be unique in the United States; but it would guarantee that physicians trained at the University of Illinois will continue to be at the forefront of developing and implementing novel biomedical technologies which are likely to have a major impact on patient care in the near future.

References

1. Kirch, D.G., M.K. Henderson, and M.J. Dill, *Physician workforce projections in an era of health care reform*. Annu Rev Med, 2012. **63**: p. 435-45.
2. Iglehart, J.K., *The residency mismatch*. N Engl J Med, 2013. **369**(4): p. 297-9.
3. Alberts, B., et al., *Rescuing US biomedical research from its systemic flaws*. Proc Natl Acad Sci U S A, 2014. **111**(16): p. 5773-7.

From: Jtolliver
Sent: Saturday, July 12, 2014 8:24 AM
To: Jorge Villegas
Subject: Re: Thanks!

I was surprised to see that this was what they circulated, since it obviously had not been proofread.

Hope you have a chance to relax this weekend and enjoy your family.

hugs
Joyce

Joyce Tolliver

On Jul 11, 2014, at 23:14, Jorge Villegas <jvillegas@utexas.edu> wrote:

Hi Joyce

It's always a pleasure to drive to Urbana and see again the great people that live there.

Thanks for the report. I just wanted to make sure that I didn't have an earlier draft but it's the same one.

Thanks

Jorge

Jorge Villegas

On Jul 11, 2014, at 9:39 PM, Joyce Tolliver <[REDACTED]> wrote:

Hi Jorge,

I'm so glad you drove to Urbana for the meeting--it was a bonus to get to have a little social time with you and some other friends. You are so dedicated to spend the extra hours driving back and forth!

Here's the report. I hope there is only one!

cheers
Joyce

On Fri, Jul 11, 2014 at 7:32 PM, Jorge Villegas <jvillegas@utexas.edu> wrote:
Hi Joyce

I'm back in beautiful Springfield!

First of all, thanks for treating us our drinks and snack.

Would you mind sending me the UIC report? I want to make sure we have the same document.

Thanks.

Jorge Villegas

--

Joyce Tolliver

<UIC Senate Task Force Response Tripp Umbach Report on UIUC medical School 7_8_14-1 copy.pdf>

From: Joyce Tolliver <j [REDACTED]
Sent: Sunday, July 20, 2014 11:45 PM
To: Phyllis Wise
Subject: Re: Harvard-MIT HST program

Phyllis, thanks for sharing this information. I think it's wonderful that Phil Sharp was one of the leaders of this program, and I trust he will be a great ally and resource.

I think it may be helpful to Urbana faculty to know about the Harvard-MIT program and how what we will be doing will be different from it. If there is any data easily available about where their grads are now, it will build a stronger case, I think.

Fingers crossed that all goes well tomorrow.

Joyce

On Sun, Jul 20, 2014 at 10:19 PM, Phyllis Wise [REDACTED] wrote:
Dear Joyce,

We are very familiar with this program since one of the leaders is our own Phil Sharp, a graduate of our Department of Chemistry and winner of a Nobel Prize. You may remember we gave him an honorary degree this year. When he was here for graduation, we asked him to meet with a small group of faculty who have been working on our COM to give his opinion of what we were trying to do and give us advice. He described the MD/PhD program shared by Harvard and MIT. He never mentioned that graduates were unable to get jobs and I have never heard of this problem with any other MD/PhD program. I will have to learn more.

I have invited Phil to serve on my Strategic Advisory Board and am supposed to talk with him tomorrow to try to convince him to join this small group of advisors. So your email is very timely. I will ask him about the issue.

Thanks again for alerting me to this,
Phyllis

Sent from my iPad

> On Jul 20, 2014, at 3:23 PM, Joyce Tolliver <[REDACTED]> wrote:
>
> Hi Phyllis,
>
> This weekend, a colleague mentioned to me the program in Health Sciences and Technology sponsored by Harvard & MIT. He stated that they graduate 25 students a year that they cannot place, and the clear implication is that there is no perceived need for such programs.
>
> It occurs to me that it would be worthwhile to find out more about this program and to investigate what their graduates end up doing, if possible. I think it would help us to better contextualize our own plans. If appropriate, a comparison to this program might strengthen the proposal.
>

> Hope you've had a chance to breathe this weekend!

>

> Joyce

> --

> Joyce Tolliver

>

>

--

Joyce Tolliver

From: Phyllis Wise [REDACTED]
Sent: Sunday, July 27, 2014 11:52 PM
To: Paul Umbach
Subject: Re: Project Update -- a few things I want you to know

Paul,

This is great. I am sure it will make him feel totally in the loop.

See you tomorrow.

Phyllis

Sent from my iPad

On Jul 27, 2014, at 11:02 PM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Thanks for being a GREAT teammate and friend. ☺

Paul O. Umbach

Founder and President

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"Turning ideas into action for 25 years"

From: Paul Umbach
Sent: Sunday, July 27, 2014 11:14 PM
To: James.Leonard@Carle.com
Subject: Project Update -- a few things I want you to know
Importance: High

Dear Jim:

I look forward to seeing you tomorrow at the project executive meeting. Now that the draft business plan has been completed we are beginning the important process of gathering input from all of the working groups and finalizing the plan.

Here are a few updates:

1. I have a phone call scheduled with the [REDACTED] on Friday the 11th – because of vacation schedules on his end this is the earliest that he was available. I plan on emailing him before the phone call with the following points: 1) We see [REDACTED] as an important partner in research and education activities, 2) However, politically it is difficult (if not dangerous) to reference [REDACTED] involvement in the official documents while planning of this new school as it will sound off

- alarms with UIC supporters, and 3) After we gain approval in September, there will be more proactive engagement with [REDACTED] Carle and the University of Illinois Urbana-Champaign. I believe that an email with key points and a follow-up phone call is the best to reinforce our points.
2. I want to reassure you about a few things with the status of the governance – 1) Our feasibility study was clear that a separate 501 c 3 model would be the best way to move forward. I had great success with this model at Commonwealth Medical College in Scranton and also recently with a Medical School in Las Cruces, New Mexico. Here are three issue that cause my feasibility study recommendation to morph into what we have currently: 1) The university had a “MUST HAVE” to issue the degree – the universities in Scranton were fine with creating a new school (founding authority) to give a brand new degree from a grand new school – The Commonwealth Medical College – not the University of Scranton. 2) The time and effort to create a new school pushes the timetable back up to an year and 3) Folks we interviewed from Carillion in Roanoke, VA said that they had a hard time getting a new “partnership school” up and running.
 3. While I liked the original idea of a separate organization, the multiple committee and work group members and the multiple lawyers believe all of the control and partnership needs for Carle can be addressed in the MOU between Carle and University. I continue to want the name of the school to be the University of Illinois Carle School of Medicine – regardless of who gives the degree. The bottom line is that the control of clinical education, research, hiring the dean and developing the curriculum will be a true partnership between the university and Carle.

I will be more closely connected over the next two months am scheduled for all of the upcoming meetings (including tomorrow) and am always available to meet one on own if you want to talk more in person – or anytime by phone. I hope this email helps as we move forward. Thanks for your confidence.

Sincerely,

Paul

Paul O. Umbach

Founder and President

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“Turning ideas into action for 25 years”

From: Phyllis Wise [REDACTED]
Sent: Monday, July 28, 2014 10:09 PM
To: Paul Umbach
Subject: Re: now for the rest of the story...

Thanks for outlining this. Good solutions. Trying to pack right now...see you tomorrow.

Sent from my iPad

On Jul 28, 2014, at 10:02 PM, Paul Umbach <PUMbach@trippumbach.com> wrote:

Hi friend. I was waiting to hear from you before sending him an invitation – so I agree that he should be invited to future private meetings. Here are three key things that I want to discuss tomorrow morning:

1. Need to have the university rules followed with faculty committees in an advisory capacity to the partnership with the Dean reporting to the two partners and having input and advisement from a faculty committee (with faculty coming from both parties – with Dr. like Jim being represented on the faculty committee). Ill explain more.
2. I want the class size to grow from 25 to 50 as FAST as possible – which will require the phase out of the scholars program with a concomitant increase in students from the new school. SO, Carle will be training 50 students all along – with the numbers for the new school growing from 25, 35, 40, 50 as the number of UIC students degresses over the same years. Major breakthrough with Carle today on this topic.
3. We need to NEVER show a budget with red for every year. Solution? Have Carle and the University pledge ongoing operating money – Carle at \$2.5 million and University at \$1 million. Or whatever! We just need to have money in the budget to make the numbers turn from red to black.

See you tomorrow. Don't worry!!!

Paul

Paul O. Umbach

Founder and President

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"Turning ideas into action for 25 years"

From: Phyllis Wise [[mailto:\[REDACTED\]](mailto:mailto:[REDACTED])]
Sent: Monday, July 28, 2014 10:37 PM
To: Paul Umbach
Subject: Re: now for the rest of the story...

Thanks Paul for the explanation. I am just now getting around to emails so I hope you went ahead and invited Jim. If not, we can invite him to our next coffee. See you at 7.

Phyllis

On Monday, July 28, 2014 9:48 AM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Hi Phyllis:

I had a long talk this morning with my team (remember that Ha and Beth have both been my sisters and teammates for more than 22 years so there are no secrets and complete trust). Here are two points that are important to keep in mind: 1) [REDACTED]

[REDACTED] 2) Do you want to invite Jim to our private coffee time? It might be good to bring him under our tent if I is available. The invitation from you (or me) would be powerful in its own right if or if not he is available.

I so appreciate your help in helping clarify this with your team. Thanks again my friend.

***Paul O. Umbach
Founder and President***

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"Turning ideas into action for 25 years"

From: Phyllis Wise [REDACTED]
Sent: Monday, July 28, 2014 10:17 PM
To: Lykins, Greg
Subject: Re: Thank you!

Thank you so much, Greg, for forwarding Bob's email. I'd really like to talk with you to learn more about your sense of where he is. Peter told me that Bob really could not articulate the essence of what we are trying to do, and neither could he. I am trying to write a simple 2-pager with key FAQs and will send it to all of you as soon as it is ready.

I am going to Princeton tomorrow for the Robert Wood Johnson board meeting. I'll try to call you on my way to the airport or during my layover in Chicago. Today was just crazy...

I just wrote to Paul and [REDACTED] to see whether there are any weekends when they will be in town later this summer or in the fall that might work for dinner for them, you and [REDACTED] and the Stephen's and us. Let's keep our fingers crossed that all the stars will align.

Thanks again for everything,
Phyllis

Sent from my iPad

On Jul 28, 2014, at 9:47 PM, "Lykins, Greg" <Gregory.Lykins@busey.com> wrote:

fyi . .

Sent from my iPad

Begin forwarded message:

From: "Easter, Robert A" <reaster@uillinois.edu>
Date: July 28, 2014 at 8:55:00 PM CDT
To: "Lykins, Greg" <Gregory.Lykins@busey.com>
Cc: "Meyer, Chris" <cmeyer@oktocom.com>, Rick Stephens <rick@investres.net>, Peter Fox <peterf@fox-companies.com>, James Leonard <James.Leonard@Carle.com>, "Clements, Vicki" <vclement@uillinois.edu>
Subject: Re: Thank you!

Greg, thanks to you and your colleagues for taking time to meet with me. I know that you each are incredibly busy and would not have made the commitment were you not supportive of the proposal. You have each made very real and often unheralded contributions to Champaign-Urbana.

I appreciate your willingness to have a frank and open discussion. I am committed to a decision that will be in the best interest of our University. The outcome, whatever form it may take, must address the needs of the UIUC faculty and facilitate local economic development.

Bob

Sent from my iPad
Robert A. Easter, Ph.D.
President, University of Illinois

506 S. Wright Street	1737 West Polk Street
Urbana, Illinois 61801	Chicago, Illinois 60612
(217)333-3070	(312)413-8301
FAX (217)333-3072	FAX (312)413-8301
E-mail: reaster@uillinois.edu	

On Jul 26, 2014, at 12:11 PM, "Lykins, Greg" <Gregory.Lykins@busey.com> wrote:

Good Morning President Easter,

I know I speak for our small group, we greatly appreciate the special time and attention you granted to us yesterday afternoon. You are a very talented and effective leader. The U of I, community and all of the constituencies are very fortunate you have been willing to serve our great institution.

We especially appreciate your candor and wisdom as you and others develop the appropriate course for the special dream of a remarkable medical school. Certainly, we are passionate supporters of the U of I and the C-U communities, but most importantly, this "project" needs to be designed for long term success. We now appreciate more than before the many facets of the decision process to develop this concept.

Please feel free to call on or involve us in any way throughout the process.

All the best,

Greg

Sent from my iPad

The information contained in this e-mail is privileged and confidential. Unless otherwise indicated or obvious from the message, this is intended only for the individual(s) listed above. Please see our Privacy Notices at <http://www.busey.com>.

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To: Academic Senate; Campbell, R H
From: Campbell, R H
Subject: College of Medicine Proposal
Sent: Tue Jul 29 23:31:57 2014
Importance: Normal

Dear Senators:

I hope you are enjoying the summer. It is turning out to be somewhat eventful for the Senate Executive Committee (SEC.) As chair, I report that at the 7/22 SEC meeting Chancellor Phyllis Wise and Provost Ilesanmi Adesida presented a Concept Proposal for an Autonomous College of Medicine on the Urbana Champaign Campus in Partnership with Carle Health System. The Concept Proposal is outlined below. The SEC briefly discussed the proposal and the meeting finished with the following motion:

=====

Motion from the 7/22 SEC meeting.

Aminmansour made a motion that the SEC offer its enthusiastic support to the Chancellor and Provost to further explore the possibility of the establishment of a separately accredited College of Medicine at the University of Illinois at Urbana-Champaign, and encourage the Chancellor and Provost to move forward with the process of review and present a proposal to the Senate as expeditiously as possible. The motion was seconded and approved unanimously.

=====

I am looking forward with interest to the discussions of this proposal in the Senate this fall!

Roy

=====

Title: Concept Proposal for an Autonomous College of Medicine on the Urbana-Champaign Campus in Partnership with Carle Health System

To: Senate Executive Committee (SEC) of the Academic Senate at the University of Illinois at Urbana-Champaign

From: Chancellor Phyllis Wise and Provost Ilesanmi Adesida

Date: July 22, 2014

As Chancellor and Provost, we propose to establish a Liaison Committee on Medical Education (LCME)-accredited College of Medicine (COM) at the University of Illinois at Urbana-Champaign in partnership with Carle Health System. It will be the first COM in the world expressly focused at the intersection of engineering, technology, big data and healthcare. One of society's greatest challenges is to provide more people with greater

access to better healthcare at lower cost. The U.S. healthcare system is undergoing historic changes driven by an aging population with more chronic conditions, an influx of millions of new people into the healthcare system due to the Affordable Care Act, and a severe physician shortage.

The University of Illinois at Urbana-Champaign is uniquely positioned to leverage our strengths in engineering, technology, and big data and apply these to healthcare.

We will leverage these strengths to lead the transformation of health care research, education, practice, and delivery.

The proposed COM will allow us to provide unparalleled medical education that will train physician-scientists, physician-discoverers, physician-inventors, and practicing physicians who will produce innovations in preventive care, diagnosis, treatment, therapies, and cures.

In partnership with Carle Health System, we propose to:

- Develop an independently-accredited College of Medicine in full partnership with the Carle Health System.
- Ensure that the College of Medicine has the flexibility to develop and expand multiple relationships with other health care, education and industry partners.
- Ensure that the new College of Medicine complements, synergizes, and creates new opportunities for collaboration with the UIC College of Medicine.
- Establish a COM that will confer a degree from the University of Illinois at Urbana-Champaign.

While it is clear that the College of Engineering will benefit from having a fully accredited COM, other colleges that teach and perform research in biomedical-related areas (LAS, CVM, AHS, ACES, SSW) will also benefit. In addition, we believe that a COM will increase the impact, visibility, respect, and rankings for our campus. This in turn will enhance our ability to attract and retain outstanding faculty, staff, and students across the campus with expertise and interests in all disciplines.

Next steps: We have working committees consisting of faculty and staff who are currently working on the governance structure, a financial model that ensures that we will not request additional general revenue funding from the state or redistribution of funds within the campus, and a curriculum that infuses principles of engineering, technology, and big data into all years of medical education. We are seeking input from all campus deans and unit executive officers who can benefit from the proposed College of Medicine; our preliminary investigations suggest broad campus support for this endeavor. Members of the Academic Senate are participating in all of the committees. We will present a proposal for approval to the Academic Senate, Educational Policy Committee, the University of Illinois Board of Trustees, the Illinois Board of Higher Education, and the Carle Board of Trustees. We will seek accreditation

from the Liaison Committee on Medical Education (LCME). Our goal is to accept the first class in 2017.

The window of opportunity to be leaders in this arena will not last long. We must act now since other institutions are attempting to bring together engineering and medicine. Our advantage is that we can leverage our unique deep and broad strengths in engineering and apply them to the medical enterprise.

Roy Campbell
Sohaib and Sara Abbasi Professor of Computer Science
Siebel Center
201 N Goodwin Av, Urbana, IL 61801-2302
Tel 217-333-0215 Email rhc@illinois.edu

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The window of opportunity to be leaders in this arena will not last long. We must act now since other institutions are attempting to bring together engineering and medicine. Our advantage is that we can leverage our unique deep and broad strengths in engineering and apply them to the medical enterprise.

From: Ilesanmi Adesida <[REDACTED]>
Sent: Thursday, July 31, 2014 6:49 PM
To: Phyllis Wise
Subject: Re: Mischief of Don Chambers

Phyllis,

We will need to unbutton our fighting gloves also. They are fighting for the future of UIC; we are fighting got the future of UIUC. Trying to constrain one for the other is no use! It will really hamper the growth and eminence of COE and UIUC. We need to line up our Senate members to get in the ring if Don decides to unbare his fangs as the USC Chair! Please talk to Tim.

I will talk to Jennifer Woodard about our Law School. What she can help us with is to drum up high profile candidates. I will talk to her.

Thanks.

Ade

On Thu, Jul 31, 2014 at 9:00 AM, Phyllis Wise <[REDACTED]> wrote:
Ade,

I had a very disturbing phone conversation with Jennifer Woodard last night. I'll tell you more when we have a chance to talk over the phone or in person. But the essence is that he believes that I am evil and that Dimitri will save all of us. I am sure he is talking with CK. He plans on using his platform at the USC to veto our COM. I/we need to figure out what I need to do, if anything, to get another audience with CK. I am going to warn Tim Koritz about what could happen at the BoT if Dimitri comes out fighting and lines up people behind him.

I never thought it would get this ugly.

Phyllis

PS Jennifer also reminded me that she wants to help with the Law School. I hope you will confer with her when you get home. She is knowledgable in this area and we need to show her that we recognize her value.

Sent from my iPad

From: Nick Burbules <[REDACTED]>
Sent: Friday, August 01, 2014 7:48 AM
To: Phyllis M Wise
Cc: Jtolliver; Ilesanmi Adesida
Subject: Re: time to get together to talk?

Ok with me. Thanks!

On Fri, Aug 1, 2014 at 7:34 AM, Phyllis M Wise <[REDACTED]> wrote:
Joyce, Nick, and Ade,

We'll find another time after Aug 13. I'll check with Ade's calendar and get back to you.

Enjoy your vacation, Joyce. I'm visiting [REDACTED] next week. Summer is going quickly!

Phyllis

Sent from my iPhone

On Aug 1, 2014, at 6:41 AM, Jtolliver <[REDACTED]> wrote:

Good morning, all,

I'm more than happy to meet, but I'm afraid Aug. 12 won't work for me--I'll be on vacation with [REDACTED] (leaving Aug. 6). I return the evening of Aug. 13. If there is any time we can all meet either before about 10AM on Aug. 6 or after Aug. 13, great; but I will understand if you go ahead without me.

best
Joyce

Joyce Tolliver

On Aug 1, 2014, at 6:27, Nick Burbules <b[REDACTED]> wrote:

Thanks Phyllis,

No problem.

On Fri, Aug 1, 2014 at 6:16 AM, Phyllis Wise <[REDACTED]> wrote:
Nick,

Please hold this time on your calendar until we hear from Joyce. Thanks so much. I hadn't heard the term ABC - that's a great marketing acronym!

Phyllis

Sent from my iPad

On Aug 1, 2014, at 6:04 AM, Nick Burbules [REDACTED] > wrote:

Hi Phyllis, Ade,

I can meet that morning. ABC is fine with me.

Nick

On Thu, Jul 31, 2014 at 11:13 PM, Phyllis Wise

[REDACTED] > wrote:

Dear Nick and Joyce,

Ade and I wonder whether you have time to get together to talk about a few important issues so that we can seek your advice. We would like to propose breakfast and one morning that we are both free is Tuesday, August 12 from 7:30-9am. We thought about the I Hotel, but I don't think they serve breakfast any longer. So I thought about the Atlantic Bread Company on Neil Street - but we are open to ideas. If this date does not work for you, we'll check further on our calendars and get back to you with other alternatives.

Thanks so much,

Phyllis

P.S. Joyce, I promised that I would not invade your time during this semester/year when you are supposed to be allowed to concentrate on your scholarship. And we promptly put you on COM committees and continue to ask you to meet with us at additional times...Not very fair. Truly, we would understand if you don't have time for this. We cannot continue to count on just a few faculty!

From: Joyce Tolliver <[REDACTED]>
Sent: Friday, August 01, 2014 8:43 AM
To: Phyllis M Wise
Subject: Re: time to get together to talk?

I appreciate this, Phyllis.

I hope you also have a chance to unwind a bit with family next week, and recharge. As you say, the academic year is almost upon us!

By the way, I'm really grateful for your sensitivity to my research needs at this moment. I've turned down quite a few committee requests in the past months to protect my time, but I will always make time for you and for the truly crucial governance issues, like the C of M.

On Fri, Aug 1, 2014 at 7:34 AM, Phyllis M Wise <[REDACTED]> wrote:
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--

Joyce Tolliver

From: Jennifer Woodard <[REDACTED]>
Sent: Friday, August 01, 2014 9:22 AM
To: Phyllis Wise
Subject: Re: context

Dear Phyllis,

This is so helpful! Honestly, our conversations always remind me how much fun it is to work on something important with a leader (you) who has both a vision and the will to move it forward!

I will work on the section about Chicago and the underserved. It will be essential for some of our constituents - as we have discussed. I will try to get language to you by Saturday. I am jammed today.

Will keep you posted re developments with Terry/Ed.

Warmest regards,

Jennifer

On Thu, Jul 31, 2014 at 10:29 PM, Phyllis Wis [REDACTED] wrote:

Dear Jennifer,

I should have given you some context to the FAQs that I sent to you. Rick Stephens, Greg Lykins, Chris Meyer, Peter Fox, and Jim Leonard met with Bob Easter last week and they came away thinking that Bob was supportive, and that he appreciated hearing support from people who were outside the university. Bob said that he thought it would be good for them to talk with the Huron consultants, who he has recruited, to help him to articulate how to present this to the BOT. They all said that they really needed talking points for that meeting - only 1-2 pages. I wrote the FAQs based upon a very dated version that Robin Kaler had written.

As I mentioned it does not call out the issue of serving the underserved. I would love you to add something on that if you have time - perhaps in the section on how Chicago and the state would benefit.

I forgot to mention on the phone that Ade said that he would call you about the Law School. He'll value your input.

It's always wonderful to talk with you - valuable, incredibly frank and open, and actually fun.

Thanks again,
Phyllis

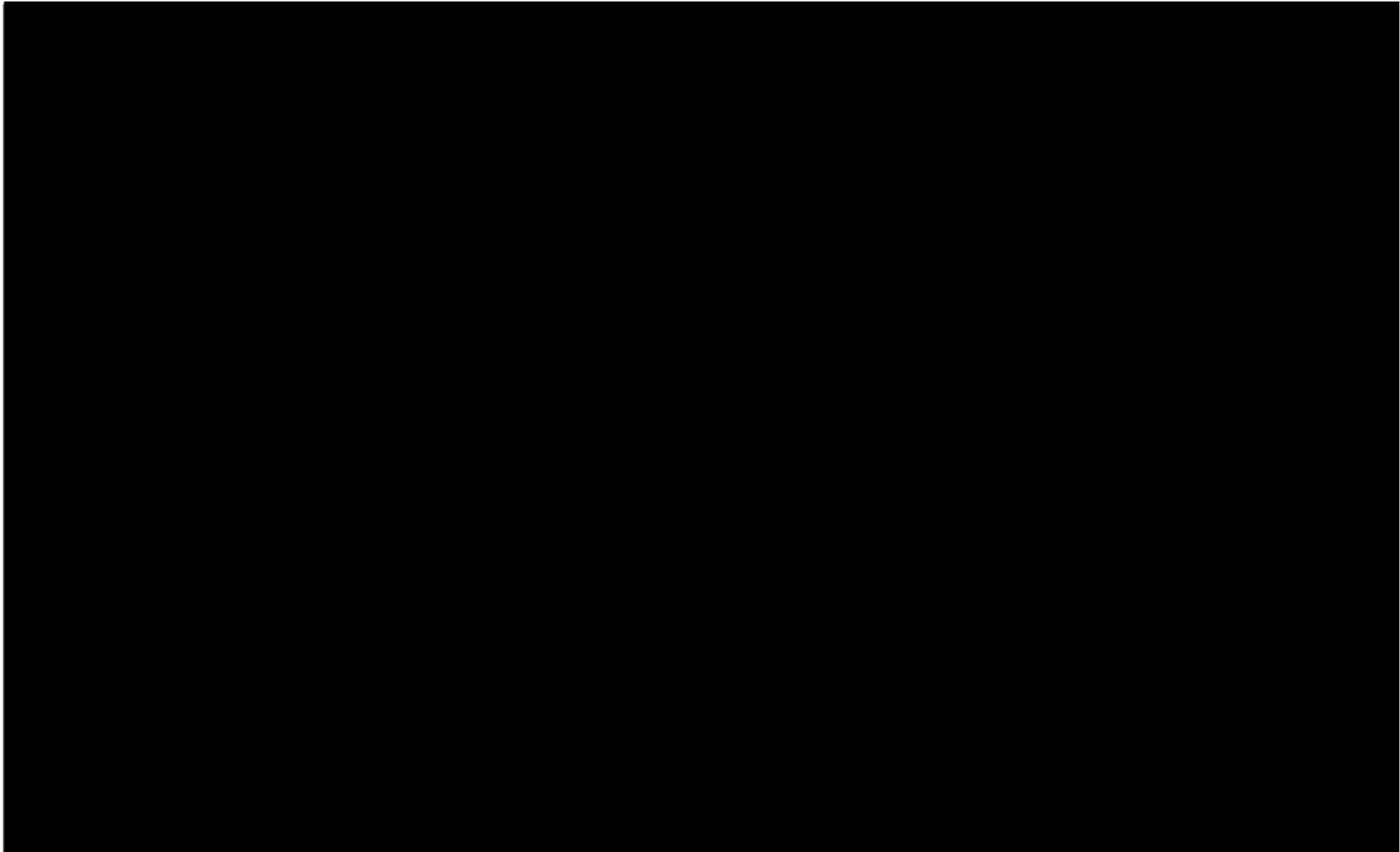
From: Normand Paquin [REDACTED]
Sent: Sunday, August 03, 2014 4:17 PM
To: Phyllis Wise
Subject: Re: Draft Recommendations for the Partnership -- for Discussion by Leadership at both Institutions

I'll edit the draft and let you see it in tracked mode later this evening.

Normand

On Aug 3, 2014 3:13 PM, "Phyllis Wise" <[REDACTED]> wrote:
Normand,

Let me try to give sketchy answers now and hope that we have time to talk about this in a couple of hours.



Thanks for asking for my advice.
Phyllis

Sent from my iPad

On Aug 3, 2014, at 11:36 AM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

I received this email from Paul Umbach with recommendations on how to close out a number of issues. I certainly welcome your input and guidance on with whom you'd like me to share this email to assist in the discussions.

Normand

Normand Paquin, PhD, MBA

Associate Director for Research

243 Coordinated Science Laboratory, MC-228

1308 West Main Street

Urbana, IL 61801

Tel: [217-244-6813](tel:217-244-6813)

Fax: [217-244-1764](tel:217-244-1764)

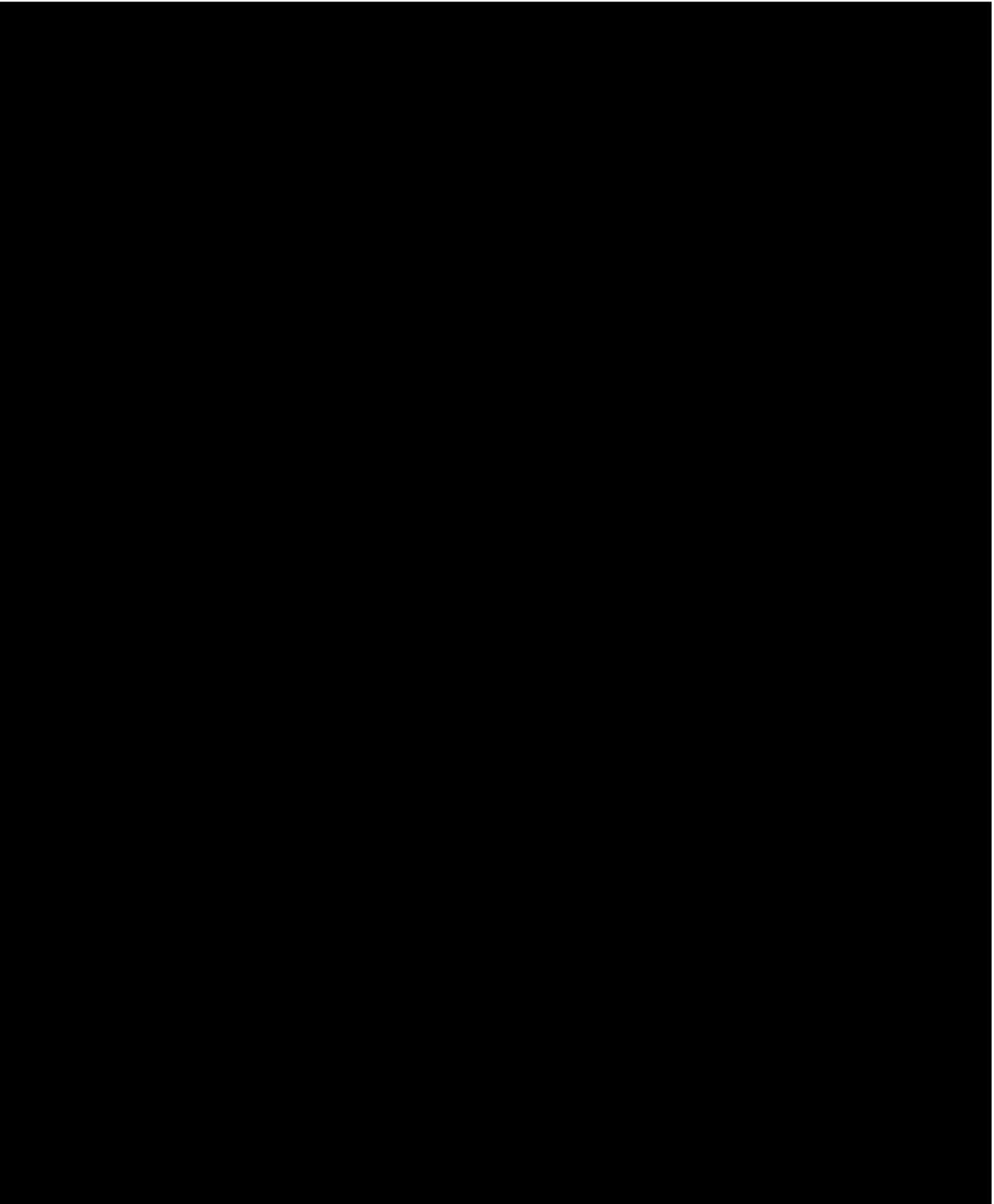
Email: paquin@illinois.edu

From: Paul Umbach [mailto:PUMBACH@TRIPPUMBACH.COM]
Sent: Sunday, August 03, 2014 11:00 AM
To: Stephanie.Beever (Stephanie.Beever@carle.com); Paquin, Normand
Cc: Beth Paul; Ha Pham
Subject: Draft Recommendations for the Partnership -- for Discussion by Leadership at both Institutions
Importance: High

Dear Stephanie and Normand:

We are very close to having a winning plan for establishing a truly transformational medical school through a partnership with your two organizations. As we discussed earlier last week, the following email reflects my recommendations on four critical issues (doors that need to be closed) to insure that the final business plan has the best chance for success and support from multiple internal and external audiences.

The four key issues are: 1) Role of Faculty Executive Committee within the governance structure, 2) Class size, 3) Funding commitments from both organizations, and 4) Naming. Here are our recommendations for discussion with the leadership from both of your teams:



I hope that this is helpful at this critical point in the project. Thank you for reviewing our recommendation with your teams and giving me your input. After I receive your input (hopefully by Tuesday morning) – I will send an updated memo with formal recommendations to Phyllis and Jim and schedule a conference call. The plan is to have closure on all four of these points prior to the second draft of the business plan and prior to our face to face meetings on the 11th of August.

Thanks again for your support of our team as we move forward.

Paul

Paul O. Umbach

Founder and President

Tripp Umbach

2359 Railroad St. #3701

Pittsburgh, PA 15222

Corporate Headquarters: 412.281.2313

Cell Number: [REDACTED]

Fax Number: 412.281.9946

www.trippumbach.com

“Turning ideas into action for 25 years”

From: Phyllis Wise <[\[REDACTED\]@uconn.edu](#)>
Sent: Monday, August 04, 2014 7:08 AM
To: Phyllis Wise
Subject: Fw: Draft Recommendations for the Partnership -- for Discussion by Leadership at both Institutions
Attachments: Draft text on key issues.docx

On Sunday, August 3, 2014 10:14 PM, Normand Paquin <[\[REDACTED\]](#)> wrote:

Phyllis,

Please find attached email text for Paul to consider. I have edited the text in tracked mode and the changes are relatively modest in scale.

I hope you will have the time to review and make further edits as you see fit. If you would like to consult others, please feel free to do so.

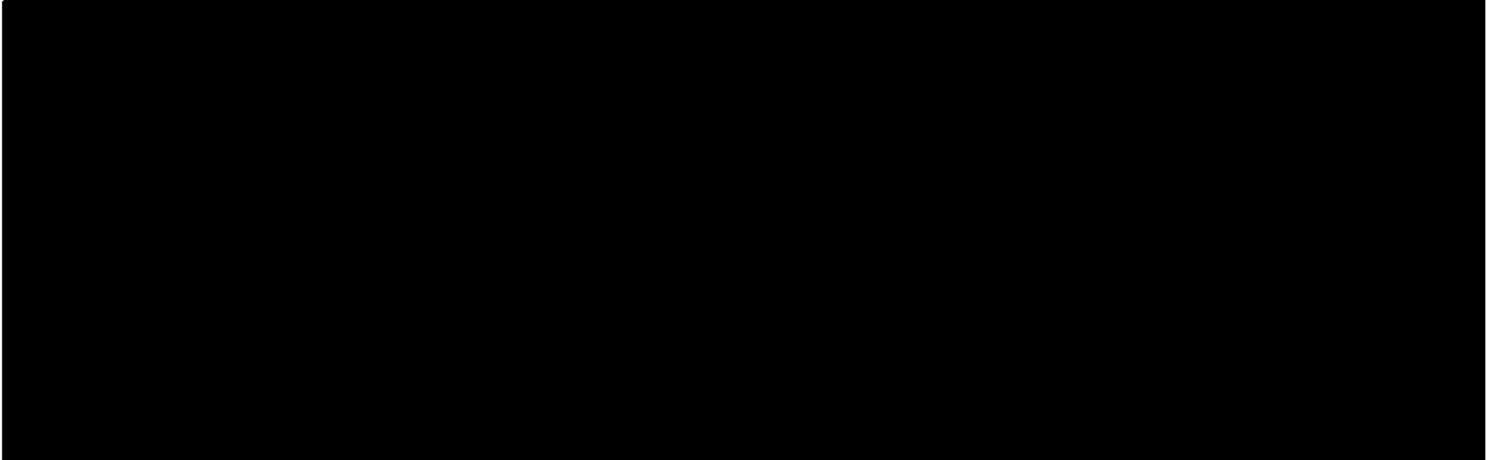
Ideally, I would like to respond to Paul's email as soon as possible and copy Stephanie on it so she can use the modified text in her discussion with Jim.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [\[REDACTED\]](#)

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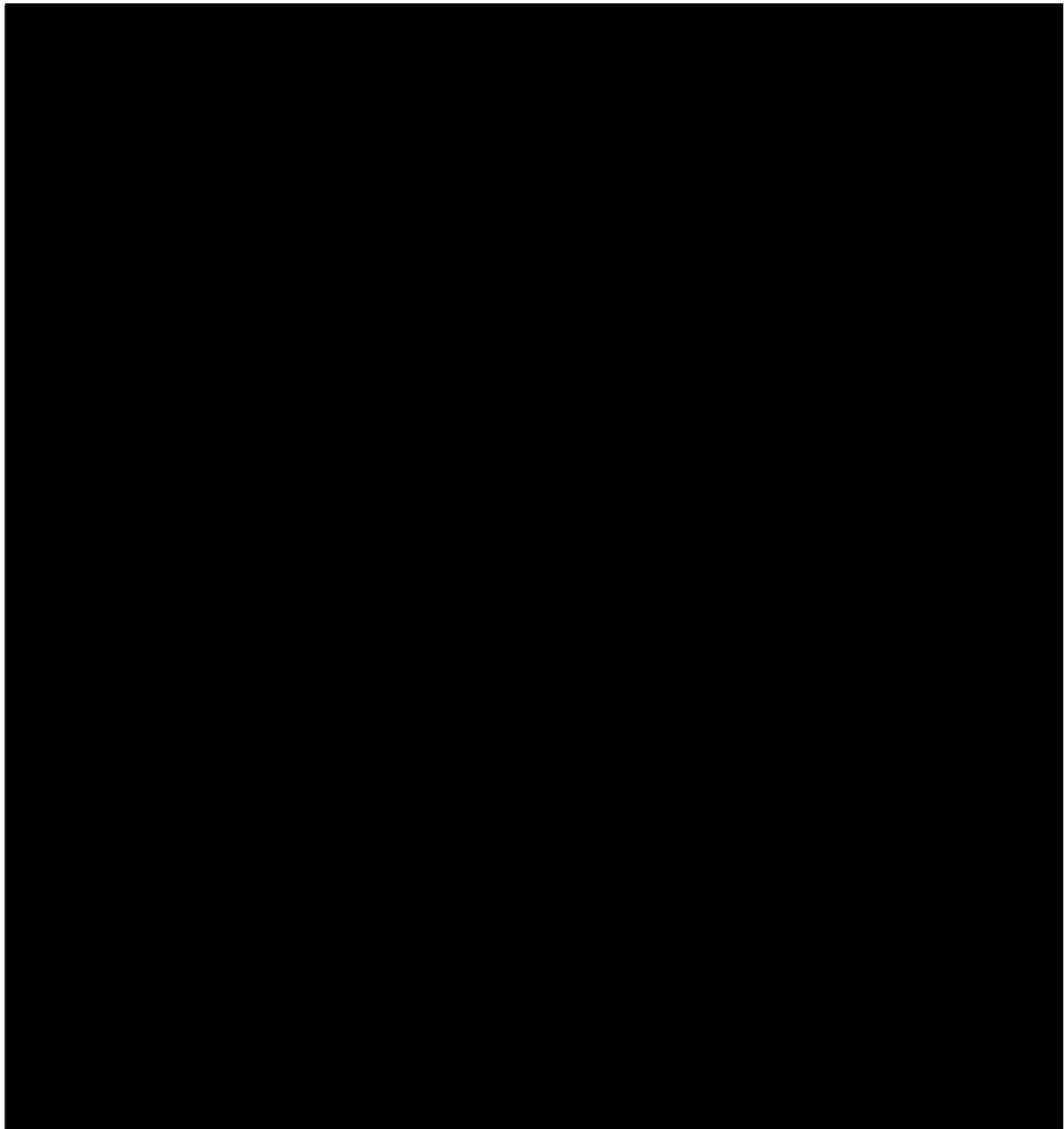
Normand Paquin, PhD, MBA
Associate Director for Research
243 Coordinated Science Laboratory, MC-228
1308 West Main Street
Urbana, IL 61801
Tel: [217-244-6813](tel:217-244-6813)
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Email: paquin@illinois.edu

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“Turning ideas into action for 25 years”

From: Wise, Phyllis M <pmwise@illinois.edu>
Sent: Monday, August 04, 2014 7:24 AM
To: Phyllis Wise
Subject: RE: Draft Recommendations for the Partnership -- for Discussion by Leadership at both Institutions
Attachments: Draft text on key issues with PMW suggestions 080414.docx

Phyllis M. Wise
Chancellor, University of Illinois at Urbana-Champaign
Swanlund Administration Building
601 East John Street
Champaign, IL 61820
Phone: (217) 333-6290
Fax: (217) 244-4121

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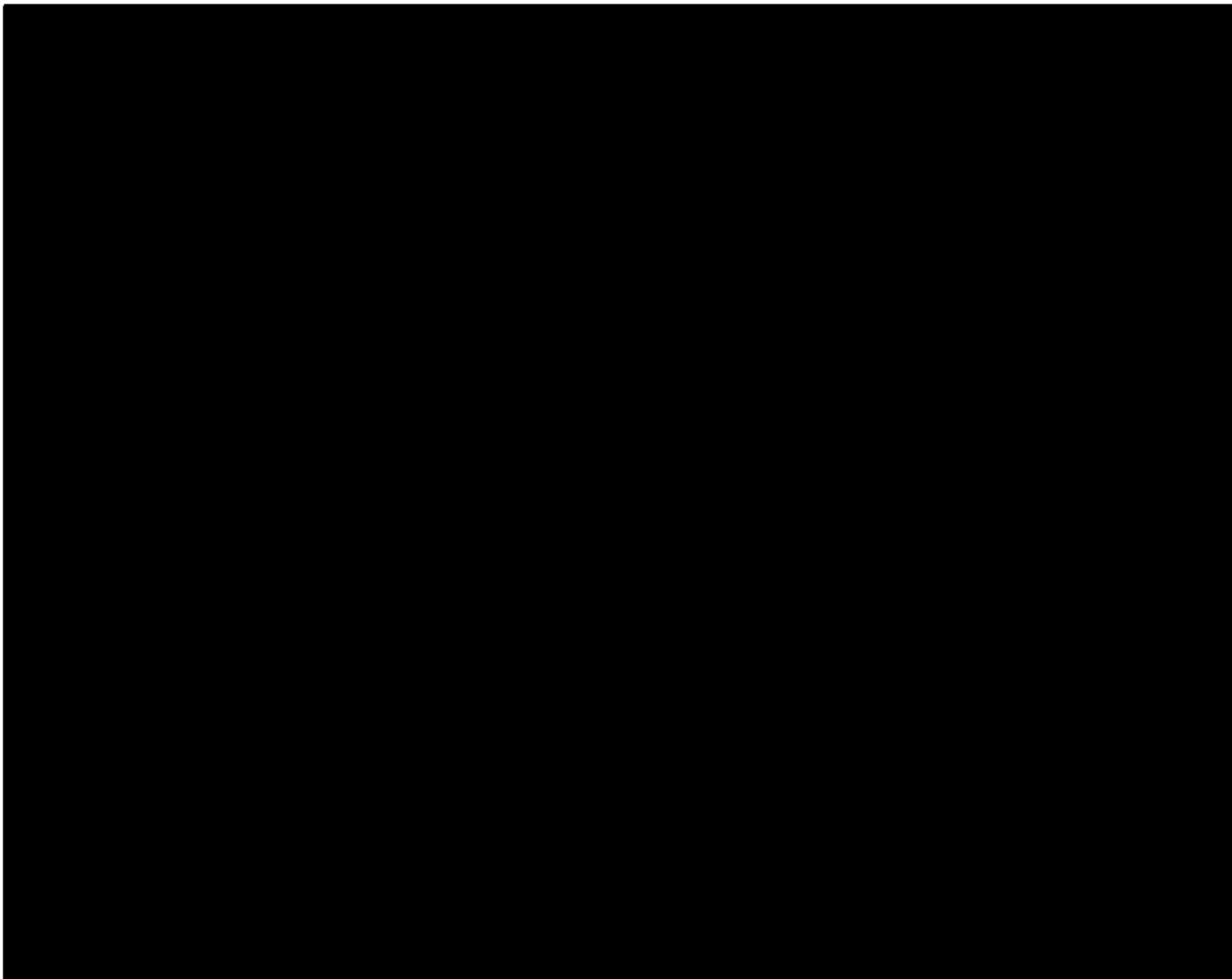
Email: paquin@illinois.edu

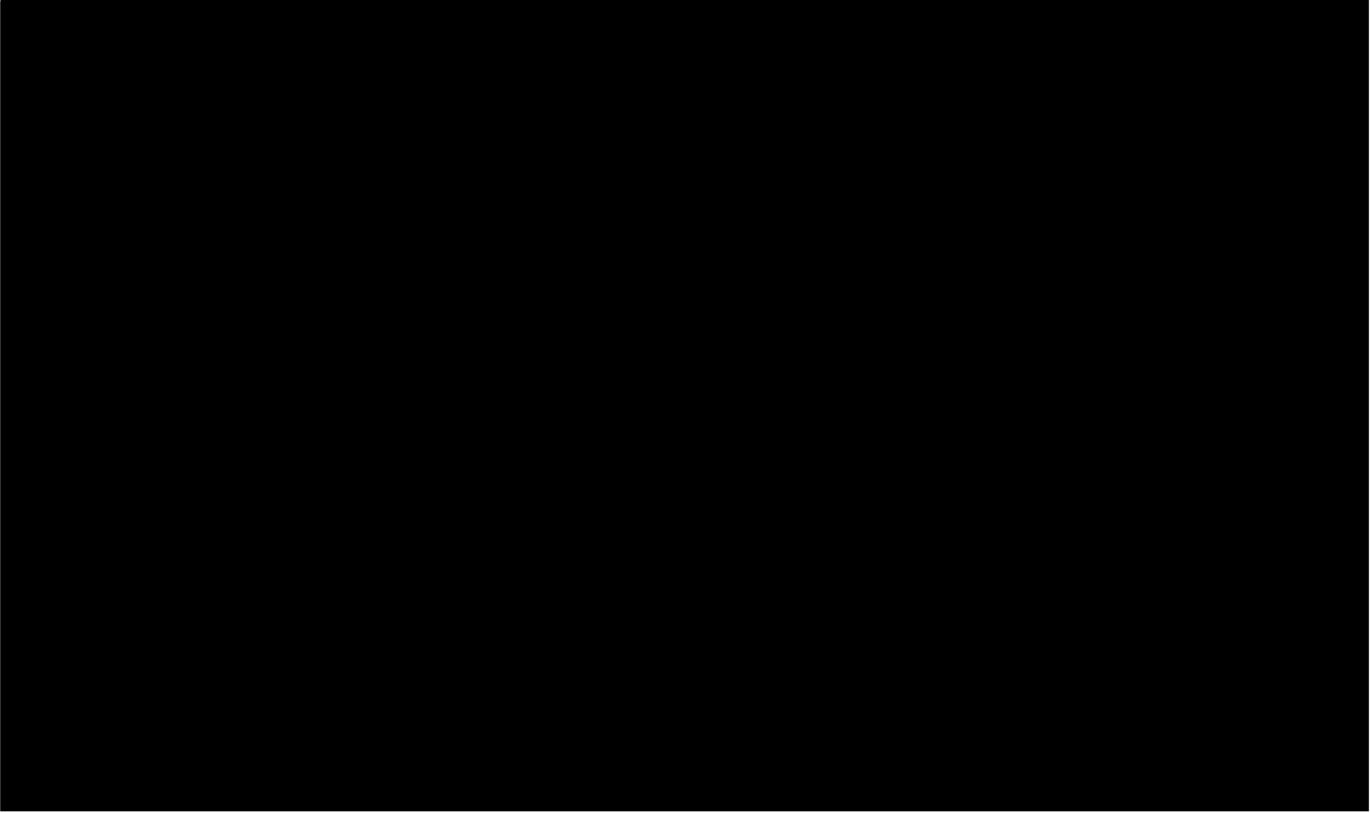
From: Paul Umbach [mailto:PUmbach@trippumbach.com]
Sent: Sunday, August 03, 2014 11:00 AM
To: Stephanie.Beever (Stephanie.Beever@carle.com); Paquin, Normand
Cc: Beth Paul; Ha Pham
Subject: Draft Recommendations for the Partnership -- for Discussion by Leadership at both Institutions
Importance: High

Dear Stephanie and Normand:

We are very close to having a winning plan for establishing a truly transformational medical school through a partnership with your two organizations. As we discussed earlier last week, the following email reflects my recommendations on four critical issues (doors that need to be closed) to insure that the final business plan has the best chance for success and support from multiple internal and external audiences.

The four key issues are: 1) Role of Faculty Executive Committee within the governance structure, 2) Class size, 3) Funding commitments from both organizations, and 4) Naming. Here are our recommendations for discussion with the leadership from both of your teams:





I hope that this is helpful at this critical point in the project. Thank you for reviewing our recommendation with your teams and giving me your input. After I receive your input (hopefully by Tuesday morning) – I will send an updated memo with formal recommendations to Phyllis and Jim and schedule a conference call. The plan is to have closure on all four of these points prior to the second draft of the business plan and prior to our face to face meetings on the 11th of August.

Thanks again for your support of our team as we move forward.

Paul

Paul O. Umbach
Founder and President
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“Turning ideas into action for 25 years”

From: Normand Paquin [REDACTED]
Sent: Monday, August 04, 2014 8:55 AM
To: Phyllis Wise
Subject: Fwd: Draft email suggestions
Attachments: Draft text on key issues COMPARE 2014-08-04.docx

Phyllis,

I made it so that all edits and comments are coming from me. I also added a comment to better explain smoothing of approach on class size ramp up.

Thank you,
Normand

Dr. Normand Paquin
Skype: normand paquin
Tel: [REDACTED]

----- Forwarded message -----

From: **Normand Paquin** <[REDACTED]>
Date: Mon, Aug 4, 2014 at 8:47 AM
Subject: Draft email suggestions
To: Paul Umbach <pumbach@trippumbach.com>
Cc: Stephanie Beever <Stephanie.Beever@carle.com>, "Ha T. Pham" <hpham@trippumbach.com>, Beth Paul <BPaul@trippumbach.com>

Paul,

Please find attached suggested edits and comments on the draft email you sent yesterday (I ported to word so I could use the tracking function). I'm copying Stephanie so she is right up to date with my thinking. I kept comments to a minimum but I am happy to discuss further if need be. I would look the group telecon in any case.

Thank you for putting the original draft together.

Normand

Dr. Normand Paquin
Skype: normand paquin
Tel: [REDACTED]

From: Phyllis M Wise <[\[REDACTED\]@\[REDACTED\].com](#)>
Sent: Thursday, August 07, 2014 3:19 PM
To: Normand Paquin
Subject: Re: Important topic for discussion and clarification

If you can give me about 15 minutes to get home and out of this car with other people, I can call you.

Sent from my iPhone

On Aug 7, 2014, at 4:10 PM, Normand Paquin <[\[REDACTED\]](#)> wrote:

I'm free now and in my office.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [\[REDACTED\]](#)

On Thu, Aug 7, 2014 at 3:05 PM, Phyllis M Wis <[\[REDACTED\]](#)> wrote:
When are you free for a phone call? I am free until about 6pm eastern time.

Sent from my iPhone

On Aug 7, 2014, at 3:58 PM, Normand Paquin <[\[REDACTED\]](#)> wrote:

Phyllis,

Mike D. and I just found out that you will be talking to Jim Leonard tomorrow. We agreed that it was worth alerting you to the fact that it became evident to us last Tuesday that the Carle financial leads have been looking at the budget and our respective contributions very differently than we had assumed. I have already set up a meeting with you Tuesday morning to fully brief you on this matter with Vicky and Molly. The implications are significant.

We think it would be important to simply indicate to Jim when you speak to him tomorrow that our team have indicated there may be an important issue to resolve here and that you will be more fully briefed on Tuesday next week. Both of you should plan on discussing this when you get together on the 20th.

Happy to discuss this over the phone if you think you need more information ahead of your call to Jim.

Normand

work is 217-244-6813

Cell is [REDACTED]

Home is 217-351-7899

Dr. Normand Paquin

Skype: normand_paquin

Tel [REDACTED]

From: Paul Umbach <PUmbach@trippumbach.com>
Sent: Sunday, August 10, 2014 9:27 AM
To: 'Phyllis Wise'
Subject: RE: How did your meeting with [REDACTED] go?

Perfect timing! I have a call with him (rescheduled by his office a million times) for 12:30 tomorrow. I will be in Chicago when I place the call. I went ahead and sent him an email which I will forward to you as I was so stressed about not being able to set a phone call. I am sorry for the delay as I know it is important to you and Jim that [REDACTED] and I talk. Call tonight if you want to catch up my dear.

Bye for now.

Paul

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-----Original Message-----

From: Phyllis Wise [mailto:[REDACTED]]
Sent: Sunday, August 10, 2014 10:06 AM
To: Paul Umbach
Subject: How did your meeting with [REDACTED] go?

Paul,

I am meeting with [REDACTED] tomorrow afternoon. Would you please let me know how your meeting with him went so that I am prepared for mine.

Thanks,
Phyllis

Sent from my iPad

From: Paul Umbach <PUmbach@trippumbach.com>
Sent: Sunday, August 10, 2014 9:32 AM
To: [REDACTED] James.Leonard@Carle.com
Subject: FW: Looking forward to our call on Friday about new medical school at UIUC / Carle Final Report April 17.2014.pdf
Attachments:

Importance: High

Dear Jim and Phyllis:

Here is an email that I sent last week to [REDACTED]. We have been going back and forth for two weeks about a time to talk as his office keeps cancelling – so I went ahead with this pro-active email. I am planning to talk with him tomorrow at 12:30 pm. I will give both of you a full update on my call (wish I had Laura with me to take perfect notes, but I will do my best. ☺).

Thanks.

Paul O. Umbach
Founder and President

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"Turning ideas into action for 25 years"

From: Paul Umbach
Sent: Wednesday, August 06, 2014 10:33 PM
To: [REDACTED]
Subject: Looking forward to our call on Friday about new medical school at UIUC / Carle
Importance: High

Dear [REDACTED]

I am looking forward to talking with you on Friday to share important information on how [REDACTED] can be an important partner in the development of a highly specialized medical school.

I am very sorry that I have not contacted you over the past six months as ANY outreach from my firm to your hospital (outside of the tour we received of [REDACTED]) would have compromised our position as "not doing any harm" to the existing University of Illinois School of Medicine at Chicago. I am reaching out to you on my Tripp Umbach email as the freedom of information act applies to all emails that include representatives from the university.

Sadly, UIC leadership is strongly opposed to a new separately accredited medical school at Urbana Champaign. The existing medical school views your hospital system as a CRITICAL clinical partner. Attached for your review is the feasibility study that my firm conducted earlier this year. For political reasons, we were unable to recommend a more formal relationship with [REDACTED] and recommended that initially the partnership be with Carle – a much less threatening

partner to UIC. We understand [REDACTED]

This being said, we plan on engaging your hospital as soon as the political smoke clears – specifically after the board of trustees of the university provides approval in November. I know of your hospital, as we complete a small physician engagement survey about 15 years ago. Our firm serves approximately 1,000 hospital and university clients in every state – in fact, I have used your hospital for benchmarking on many occasions and see you as a model regionally focused exceptionally strong comprehensive healthcare provider. I can also share that the leadership at both the University in Urbana and Carle Health System are interested in your participation – especially on the research side as you have made significant contributions which I toured.

I hope this email is helpful as we prepare for our call on Friday morning.

Sincerely,

Paul

Paul O. Umbach
Founder and President

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April 17 | 2014



Evaluating the Feasibility of a New College of Medicine in Urbana-Champaign

Analysis and Recommendations

Final Report

Prepared By:



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I. INTRODUCTION

In January 2014, Tripp Umbach was retained jointly by the Carle Health System and the University of Illinois Foundation to conduct a feasibility assessment to identify the costs, opportunities, and benefits of establishing a four-year medical education program at the University of Illinois at Urbana-Champaign.

This report includes key findings and recommendations for the most feasible college of medicine program. This study allows leaders at the Carle Health System and the University of Illinois at Urbana-Champaign, as well as regional and state government, education, health care, industry, and economic development partners, to better understand the costs and benefits associated with the development of a four-year college of medicine on the flagship campus of the state's largest public research university.

II. PROJECT OVERVIEW

This study was developed by Tripp Umbach, with active engagement by the Carle Health System and the University of Illinois at Urbana-Champaign, to meet the following objectives:

- Explore the advantages and disadvantages, as well as the cost and benefits of developing various medical school models.
- Conduct an analysis of the clinical and educational capacity of the Carle Health System and the University of Illinois at Urbana-Champaign, as well as other institutions statewide, to develop a new medical school.
- Develop a feasibility study report document to allow the Carle Health System and the University of Illinois to make an informed decision regarding the implementation of a

This report provides the research,

data analysis, and insight to

allow partner institutions to make

an informed decision regarding

moving forward with a new

medical education and

research program in Urbana-

Champaign.



Carle

potential college of medicine in Urbana-Champaign and the associated fundraising implications.

- Develop an assessment of the potential economic impact of the “most feasible” college of medicine, profiling the multiple economic benefits associated with the operations of a new college of medicine, as well as clinical, research, and commercial spinoff activities on the Urbana-Champaign region and the state of Illinois.

The health care industry is undergoing transformative change due to many factors, including unsustainable increases in costs, an aging patient and physician population, a primary care provider shortage, and the need to shift from a medical education and health care delivery system focused on providing episodic care to one designed to prevent and manage disease. The future of health care requires that patients, providers, academic institutions, community organizations, and industry work together in innovative ways to provide high-quality care with better outcomes at lower costs.

The community of Urbana-Champaign is unique in its ability to address these challenges. It contains not only a leading research-based university, but also a high-quality, fully integrated health care delivery and financing system. The University of Illinois at Urbana-Champaign and the Carle Health System recognize the potential to leverage this advantage to shape the future of health care through the development of a medical education enterprise.

To determine the feasibility of various options for this development, these organizations retained the services of Tripp Umbach, a Pittsburgh-based consulting firm. Tripp Umbach is the national leader in conducting feasibility analysis and economic impact studies for academic medical campuses and for new or expanded medical schools. Tripp Umbach has provided consultation and analysis services to almost every new or expanded medical school over the past 10 years, and has completed individual studies for more than 75 academic medical centers. Since 1995, Tripp Umbach has completed national studies measuring the economic impact of 130 medical schools and more than 400 teaching hospitals for the Association of American Medical Colleges (AAMC). Tripp Umbach’s extensive experience makes the firm the most qualified to assess the feasibility and economic impact of a new college of medicine.

To determine the feasibility of a new medical enterprise in Urbana-Champaign, Tripp Umbach conducted interviews with leaders throughout Illinois, including stakeholders representing higher education, health care, industry, and government. More than 40 individuals from over a dozen entities were engaged. Interviews were conducted not only in Urbana-Champaign, but also in Peoria and Chicago. Detailed listings of the individuals and organizations are listed in Appendix A.

Incorporating findings from these interviews, Tripp Umbach analyzed the feasibility of three specific models of medical education development, including the development of a specialized engineering-based college of medicine in Urbana-Champaign through a corporate structure created by the Carle Health System and the University of Illinois at Urbana-Champaign, the development of a new college of medicine through stronger alignment with UIC College of Medicine, and the development of a larger regional college of medicine with partner hospital systems in both Urbana-Champaign and Peoria. These models are described in greater detail in Section V of this report.

The most critical success factor in the development of a new college of medicine is the presence of motivated project leaders who believe that the new college of medicine will benefit existing academic institutions, health care providers, community residents, and the economic development of the region. Additional factors necessary for successful development include engaged faculty and clinicians interested in teaching and research, facilities and resources to provide education and scholarship opportunities, the ability to provide the appropriate breadth and depth of clinical experiences to students, and the financial support to start the new school and sustain operations in a manner which satisfies the accrediting body of allopathic medical schools in the United States, the Liaison Committee on Medical Education (LCME).

During the 1980s and 1990s, no new medical schools were developed in the United States. In 2006, growing concern over physician shortages led the Association of American Medical Colleges (AAMC) to issue a policy statement calling for a 30 percent increase in medical school enrollment. Since then, 15 new medical schools have been established, and more are in development. Notably, four new medical schools (Hofstra North Shore-LIJ, Oakland William Beaumont, Virginia Tech Carilion, and University of South Carolina-Greenville) have recently been established as a result of a partnership between an existing university and a major health system. Each of the health systems already had extensive experience providing both undergraduate and graduate medical education. This factor helped address one of the most difficult challenges faced by new medical schools—the ability to provide the appropriate breadth and depth of clinical experiences.

Based upon Tripp Umbach's extensive experience with the development of new medical schools, its feasibility analysis of a new college of medicine enterprise in Urbana-Champaign, and the recognition of universal support among key stakeholders, Tripp Umbach believes that the model outlined in the following report provides the best opportunity to change the way health care is delivered throughout Illinois and the nation. Most importantly, the existing strengths of the University of Illinois at Urbana-Champaign and the Carle Health System, as well as the two partners' collaborative energy and dedication to the transformation of health care, are significant indicators of the long-term success of the proposed medical enterprise.

CONSULTANT SUMMARY

Tripp Umbach recommends the development of a specialized engineering-based college of medicine in Urbana-Champaign through a corporate structure created by the Carle Health System and the University of Illinois at Urbana-Champaign. This specialized engineering-based college of medicine would ideally admit its first students in the fall of 2017, and would aim to revolutionize the delivery of health care through the integration of advanced technology, transform the quality and efficiency of regional health care delivery, strengthen the university statewide, grow statewide bioscience economic development, and serve as an international magnet for innovation, research, and scholarship. Tripp Umbach cautions that the institutions must move quickly to implement this recommended program to advance Carle Health System as a premier national health care leader and to allow the University of Illinois to maintain its position as an international leader in engineering and other technology-based research.

Recommendation #1: Develop an independently-accredited college of medicine through a private governance structure.

After completing a comprehensive review of options outlined below in this report, Tripp Umbach recommends that the Carle Health System and the University of Illinois at Urbana-Champaign form a private organization to serve as the foundation for an independently-accredited research, technology, and engineering-focused four-year college of medicine at the University of Illinois at Urbana-Champaign, with the Carle Health System and the University of Illinois at Urbana-Champaign serving as equal partners in teaching, research, clinical education, and commercialization of new discoveries. Students of the new school will graduate with a degree awarded by the University of Illinois at Urbana-Champaign, but governance of the school will be achieved through a partnership between Carle Health System and the University of Illinois at Urbana-Champaign.

Tripp Umbach recognizes that these two organizations already partner on multiple levels and have exceptional opportunities to expand clinical translational research and to continue their strong partnership in medical education through a joint college of medicine. Tripp Umbach recommends that a name that incorporates both partners be established immediately to avoid confusion with the current UIC College of Medicine. This new school will replace the existing regional campus structure in which the University of Illinois Urbana-Champaign campus trains 125 M1, 25 M2, 25 M3, and 25 M4 students who receive a medical degree from the UIC College of Medicine. Tripp Umbach recommends that the new college of medicine, through a contractual relationship with the UIC College of Medicine, continue to train 100 M1 students who will complete M2 through M4 at regional

campuses in Peoria and Rockford and who will receive a medical degree from the UIC College of Medicine when they graduate.

Tripp Umbach recognizes the following strengths of the two founding partners as critical to the development of the groundbreaking new college of medicine:

- **Carle Health System** – Carle's integrated health care system is already a model for effective and efficient health care delivery, focusing on the patient while incorporating teaching and research in its daily operations. Comprised of a 345-bed tertiary care hospital, a critical access hospital, a 380-member employed physician group practice, and a 325,000-member health plan, the Carle integrated system is designed to deliver high-quality affordable health care focused on improving health outcomes in a fiscally responsible manner for 1.5 million residents. As a fully-integrated health system, Carle has the capacity, data, and provider base to transform health care delivery. Carle's model ensures that the continuum of primary and specialty care, whether delivered in an outpatient or inpatient setting, is built upon utilization of a system-wide electronic medical record, application of evidence-based medicine, and focus on patient safety and satisfaction and continuous quality improvement.
 - Health care systems are being developed across the country as the preferred delivery model for patient care. Utilizing a health system model that partners physicians and patients across the continuum of care improves care coordination, reduces redundant testing and increases patient satisfaction. A critical component of care coordination is optimizing the use of technology through electronic health records (EHRs) that are accessible to all providers and patients. Carle has deployed the use of an EHR system across multiple locations and services, and its patients are encouraged to engage in “e-health” services. Developing an engineering-based medical school with a partner that is a leader in implementing and using technology to coordinate care and empower patients is a unique opportunity that Carle can provide.
 - A common theme in discussions of how to improve the current health care system is maximizing data. Data fragmentation frequently occurs in health care delivery because information about patient care cost and utilization is often housed on a payor's system and is not accessible to providers for the evaluation of cost-effective care models. By owning a robust insurance company, Carle is able to achieve what most other providers cannot – access to utilization and cost of care data. Carle's ability to teach future physicians about data-driven decision-making and innovation based on big data will be a key asset for the new engineering-based medical program.

- Because Carle Health System has a provider-owned insurance company, all components of delivering care are merged. This allows physician training to occur in an environment where physician, patient, and payors' incentives are aligned to provide appropriate care in a manner that is efficient and cost-effective. Carle's fully integrated health system, including the insurance company, enables flexibility across all aspects of the organization to develop compensation models that align goals for improved health outcomes, patient satisfaction, appropriate use of resources, and a full continuum of care. Furthermore, Carle's insurance company data can be used to support the cost-effectiveness of evidence-based team patient care.
 - Complementing Carle's approach to the delivery of medical care is Carle's long-term commitment to medical education and research. Through its residency programs in Family Medicine, Oral and Maxillofacial Surgery, and General Surgery, and its partnership with the University of Illinois' Internal Medicine residency program, Carle trains physicians in an integrated health care delivery system that prepares physicians for practicing medicine in a quality-driven, technologically-advanced, innovative, and efficient environment. Supporting this commitment is a robust Continuing Medical Education (CME) program for physicians, nursing education programs, and training programs for ancillary technicians.
 - The Carle Research Institute is focused on translating medical knowledge into practical applications for patients. Carle physicians, nurses, residents, and scientific research partners from other entities, including the University of Illinois at Urbana-Champaign, are currently engaged in 107 research studies and are working together to support numerous clinical trials to translate lab discoveries into practical applications for better patient care. Current research projects include optical medical imaging, traumatic brain injury, and genomic diagnostics in cancer. Carle's integrated model, including clinical care teams, electronic health records, data analytics, and a health insurance company, provides a laboratory where research, education, and quality patient care combine to transform health care.
- **University of Illinois at Urbana-Champaign** – The University of Illinois at Urbana-Champaign is consistently ranked among the top five universities in National Science Foundation (NSF) funding. A new engineering-focused college of medicine based in Urbana-Champaign will immediately be positioned to bring new federal, corporate and foundation support into the region for innovative multidisciplinary research involving patients, scientific research, and advanced technology-driven solutions.
 - The College of Engineering is among the highest ranked Colleges of Engineering in the nation and is actively engaged in engineering innovations for medicine. It is highly sought after as a

partner for pursuing the integration of engineering and medicine. For example, the Mayo Clinic has chosen the University of Illinois at Urbana-Champaign College of Engineering as its primary technology and genomics partner after a rigorous evaluation of other top engineering schools. Additionally, the top 10 United States medical schools as ranked by total federal funding from the National Institutes of Health (NIH) also have ongoing research collaborations with engineering and science faculty at the University of Illinois at Urbana-Champaign.

- The University of Illinois at Urbana-Champaign is a comprehensive research-intensive university. Thus, while the new college of medicine would be engineering-based, it will draw on new and extraordinary opportunities for collaboration with other colleges to infuse technology-based medicine in their educational and research missions. For example, the new college of medicine could partner with Applied Health Sciences to develop technology-based solutions for health care delivery for the growing elderly population. Additional partnerships could include quantitative biology and biotechnology-based collaborations with Liberal Arts and Sciences, as well as novel partnerships with Veterinary Medicine, Agriculture and Consumer and Environmental Sciences, the Division of Nutritional Sciences, and Social Work.
- The University of Illinois at Urbana-Champaign has the elements necessary not only to pursue discoveries and innovations, but also to facilitate their adoption and commercialization. Many colleges and faculty members can support the design, applied health assessments, and behavioral and social elements related to adoption of medical innovations. The University has a faculty determined to develop an innovative engineering-centric and team-centric curriculum that will transform innovation among students. The University will also be able to leverage its research park and startup ecosystem to create pipelines of biotech companies and to partner these companies with an extensive industrial biosciences network of state and national enterprises.
- The University of Illinois at Urbana-Champaign will be able to leverage excellent facilities, including the Blue Waters supercomputer and the extensive imaging facilities available at the Beckman Institute, as well as robotic, data visualization, and cybersecurity test beds found in different multidisciplinary units of the University and the College of Engineering. In addition, a major Electrical and Computer Engineering building will be completed in late 2014, and Everitt Laboratory will become fully renovated space for the Department of Bioengineering in 2015-2016. The current facilities housing the existing college of medicine are also undergoing major renovations. Finally, land exists for a future medical research campus to be created.

- The University of Illinois Urbana-Champaign already has well established connections with Carle. This includes bridges established through the Division of Biomedical Sciences, the Mills Breast Cancer Institute, the Carle Neuroscience Institute, and departments with faculty affiliates with well-established connections with colleagues at Carle. These provide a strong foundation for the partnership's success.

This unique public-private medical school, organized as a private entity, has the advantage of shared governance and risk, as well as the flexibility to add multiple partners and adapt to rapid changes in health care, education, and science. The model also allows partners to avoid conflicts with the UIC College of Medicine, the state's publicly supported college of medicine that currently trains more physicians (largely primary care physicians) than any other medical education program in the United States. As outlined in greater detail in this report, medical education and research in the State of Illinois, which has lost ground to other states over the past 15 years, will be strengthened by multiple collaborations with the new highly specialized independent college of medicine at the University of Illinois at Urbana-Champaign.

While Tripp Umbach recommends that the majority of the Board of Directors for the new college of medicine represent health care, education, civic, business, and industry leaders from the Urbana-Champaign community, in order to facilitate collaboration and coordination between the UIC College of Medicine and the new college of medicine, Tripp Umbach also recommends that the Board of Directors for the new independent college of medicine include the Vice Chancellor for Health Affairs and Dean of Medicine of the University of Illinois at Chicago College of Medicine. Other Director positions should include a dean of an existing "aspirational peer" medical school and a representative from the Chicago business community.

Recommendation #2: Ensure that the new college of medicine is built on an innovative engineering- and diverse team-centered curriculum and housed within a unique educational and translational science facility that leverages the collective strengths of the founding partner institutions.

Tripp Umbach recommends that the new college opens in the fall of 2017 with 25 students in the initial class and grows to 50 students per class within the first six years of operations. Many of these medical students are expected to also be enrolled in PhD programs in majors such as bioengineering, material science engineering, electrical and computer engineering, computer science, molecular and cellular biology, biochemistry, and other quantitative life sciences. Numerous opportunities for additional joint degrees will be possible. The new college of medicine will be the first in the nation to differentiate itself based upon collaboration between medicine, engineering, technology, and quantitative sciences, providing it with an immediate competitive advantage over existing national and international schools of medicine. While similar university and health system models are being developed in Austin, Texas, Roanoke, Virginia, and Greenville, South Carolina, none of these new medical school projects have the degree of integration that is possible in the recommended model. Further, the University of Illinois at Urbana-Champaign, a member of the American Association of Universities (AAU), is a stronger research university than either the University of South Carolina or Virginia Tech, and Carle provides an integrated health care delivery model that is not available in any of the aforementioned markets.

Tripp Umbach believes that a small, highly specialized medical school, developed through a public-private partnership between the University of Illinois at Urbana-Champaign and the Carle Health System, is preferable to a traditional, clinically-focused, multi-hospital distributed training model focused on meeting physician workforce needs. The development of a highly innovative curriculum, which prepares physicians trained in critical thinking, analytical approaches, and the ability to deliver appropriate care in an inter-professional, patient-centered environment with ready access to the next generation of sensors, data mining tools, materials, imaging, genomics, and robotics, will produce physician-scientist and physician-engineer leaders who will train future community-based-physicians who graduate from other medical schools, including the UIC College of Medicine, throughout the United States and internationally.

Tripp Umbach recommends that the curriculum for the new college of medicine build upon the University of Illinois at Urbana-Champaign campus' top-rated engineering- and science-based research programs to train physician-engineers and physician-scientists engaged in biomedical research that fully integrates state-of-the-art and future technological innovations in the curriculum to ultimately improve care and outcomes. The curriculum will include inter-professional training and practice interfaces with colleges and schools on Urbana-Champaign campus and with multiple partner educational institutions throughout the region, state and nation. It is

recommended that this new college of medicine be a leader in team-based education and service delivery. The commercialization of the college of medicine's innovations will be an economic development engine for the state of Illinois as faculty and graduates of this new program will be likely to start locally based biotechnology companies which provide jobs and other economic benefits. Additionally, the new school should benefit from its investment in intellectual property developed by faculty at the new college of medicine. A portion of new revenue generated through school and faculty contracts with third-parties, licensing, and consulting will be reinvested to strengthen the new college of medicine.

The University of Illinois at Urbana-Champaign College of Engineering has already contributed major advances in biomedical engineering. Current research poised to revolutionize primary and surgical care includes:

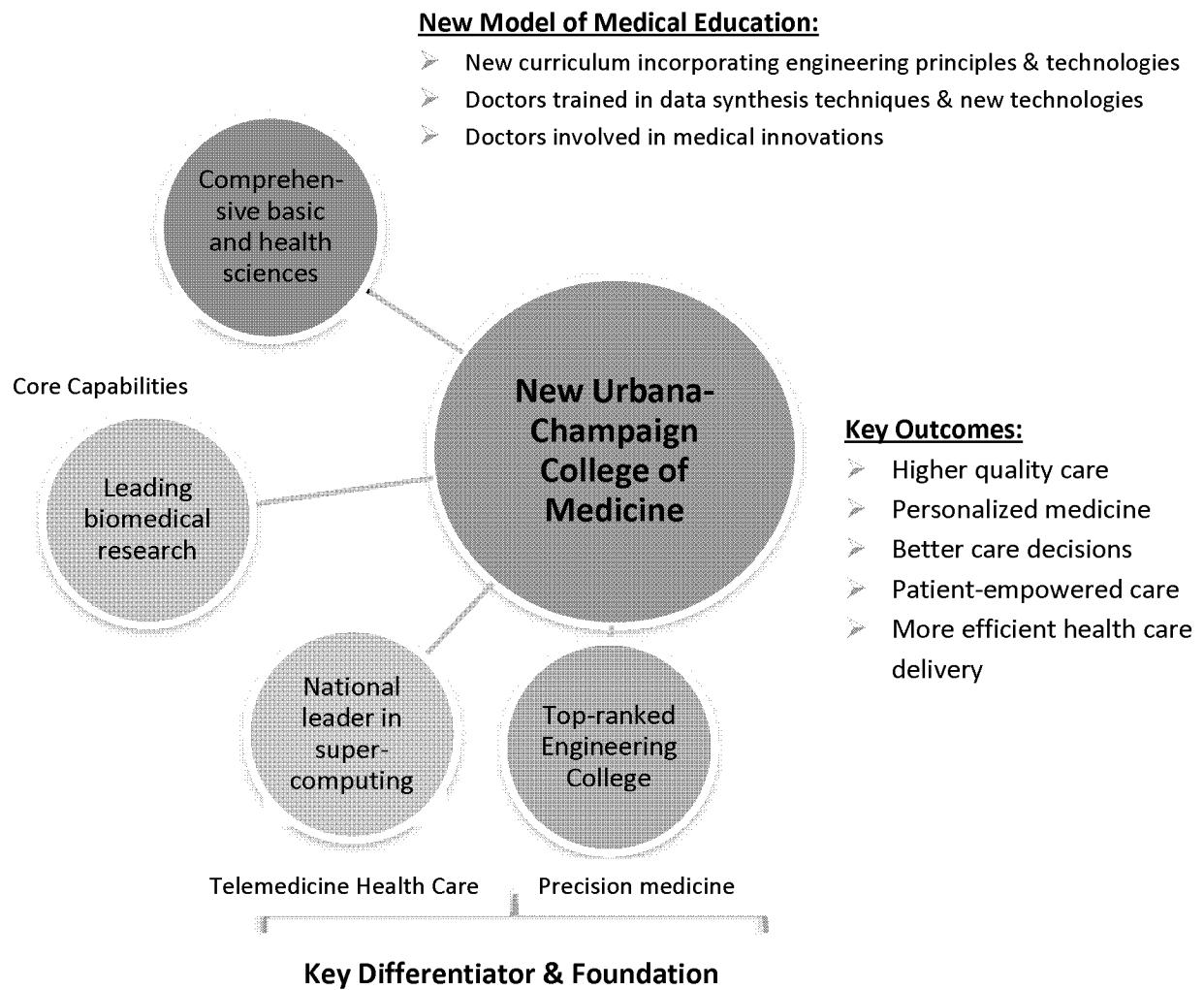
- ✓ Flexible silicon semiconductors to monitor body functions
- ✓ Biodegradable electronics technology for use in medical implants
- ✓ Mobile phone-based portable diagnostics
- ✓ Advanced real-time high resolution imaging during surgery
- ✓ Handheld systems for detection of infections
- ✓ Biological soft micro-robotics for drug screening and chemical analysis

The new college of medicine will leverage these existing strengths to train physicians with clinical experience to collaborate effectively with engineers, computer scientists, lawyers, business leaders and other professions. This collaboration will enable effective research and facilitate the application of trans-disciplinary theory to attack diseases that have the greatest impact on health status and cost of care, including cancer, cardiovascular disease, and neurodevelopmental and neurodegenerative diseases.

Physicians graduating from the new school will launch their future residencies, research, and clinical careers with new strengths in quantitative methods, engineering, and technological platforms, as well as strong biological and clinical backgrounds.

Tripp Umbach recommends that the new college of medicine evolve over time as the anchor of an interdisciplinary, research-intensive medical campus, with medical students engaged in self-directed dual-degree programs in engineering and other programs that may be developed or expanded in the future. A medical education facility, including advanced technology, rich inter-disciplinary research labs, incubation space for start-up companies, and a state-of-the-art simulation center, will be needed eventually. While built to accommodate 50 medical students in each class, this science and engineering-based facility will have spaces that promote inter-disciplinary and inter-professional education, research translation, and commercial application – within a unique, industry-changing facility.

Image 1: New Model of Medical Education



Recommendation #3: Expand the capacity within the two partners to ensure long-term sustainability of the new medical school.

Medical Education Enhancements

While a business plan will be developed in 2014 and application for accreditation by the Liaison Committee on Medical Education (LCME) will be finalized in 2015, Tripp Umbach recommends the following hiring plan for the new college of medicine:

- The new college of medicine should begin in 2015 with the recruitment of a founding dean, who must be a nationally recognized leader in engineering and science-driven medicine.
- In 2016, the founding dean will lead efforts to recruit and/or retain five assistant professors, five full professors, 20 clinical research faculty, and 20 clinical teaching faculty, to teach students and conduct research in collaboration with clinical partners at the Carle Health System and educational partners throughout the University of Illinois at Urbana-Champaign, especially the College of Engineering. In addition, Tripp Umbach recommends that the new college of medicine secure 12 additional staff members to provide accreditation, fundraising, administrative, and student support, as well as services related to finances and student admissions.

Clinical Education Enhancements

Planning for a successful new college of medicine in Urbana-Champaign will require the development of new training sites and a commitment to the highest quality clerkships and residencies for students. In addition to Carle Health System's four high-quality residency programs, Tripp Umbach recommends that the new college of medicine expand clinical training capacity for undergraduate and graduate medical students, residents, and fellows through the development of funds and effort policies to support Carle Health System physicians for increased commitments to research and teaching. Currently, Carle Health System provides approximately 63 percent of all clerkships to Urbana-Champaign-based medical students, as indicated below, and it is recommended that the new college of medicine continue to have an open faculty model to encourage physicians and health care providers from other facilities and groups to participate in the teaching of medical students: (Table 1)

Table 1: Clerkship Experiences 2008 to 2013

Site	Number Clerkship Experiences	Percent
Carle Foundation Hospital	738	0.57
Presence Urbana	198	0.15
Presence Urbana/VA	51	0.04
Carle/VA	40	0.03
Christie (all sites)	24	0.02
VA	23	0.02
Carle/Presence Urbana	20	0.02
Private Offices C-U	17	0.01
Carle/Christie	11	0.01
Bloomington Bromenn/Carle	7	0.01
Danville Presence	7	0.01
Pavilion	6	0.00
Carle/Danville Presence	5	0.00
Bloomington Bromenn	4	0.00
Philo Clinic private	4	0.00
Frances Nelson	4	0.00
Christie/Presence Urbana	3	0.00
Bloomington Bromenn/Christie	2	0.00
Danville/Bloomington Bromenn	2	0.00
Gibson City	2	0.00
Carle/Frances Nelson	1	0.00
Monticello Kirby	1	0.00
Paxton	1	0.00
Other Medical Schools	134	0.10

Tripp Umbach also recommends that a compensation and effort deployment model be developed at the Carle Health System to recognize and reward physician faculty for their increased efforts in teaching and new research collaborations anticipated with the creation of the new medical school. The development of methods to support physicians in their academic efforts through dedicated time for research and training is imperative for the college of medicine model to be successful. In return for this investment, the new college of medicine will attract high-quality physicians seeking clinical and/or research positions at the University of Illinois at Urbana-Champaign and the Carle Health System. It is also important that faculty from the University of Illinois at Urbana-Champaign be encouraged and supported as they engage in joint research with physicians and other providers at Carle Health System.

Graduate Medical Education Expansion

The new college of medicine's ultimate success is related to its ability to develop a regional Graduate Medical Education Consortium that would augment the Carle Health System by engaging additional hospitals and community physician and provider groups statewide, to expand the residency training opportunities available in the Urbana-Champaign region for college of medicine graduates. It is important to note that the overall goal of the new college of medicine is to produce practicing physician-scientists, and each graduate of the new college of medicine will need to complete an accredited graduate medical education (residency) program. Partnerships with other large established teaching hospitals in the State of Illinois are imperative for clinical education, as support for expanded GME offerings may require resources outside the current Carle Health System. Therefore, the final business plan must include a plan to address the need for additional graduate medical education opportunities for graduates of the new medical school.

Recommendation #4: Ensure that the new college of medicine has the flexibility to develop and expand multiple relationships with other health care, education, and industry partners nationally and internationally for the benefit of strengthening the founding partners and the economic impact to the state of Illinois.

The model recommended within this report identifies two founding partners. However, successful schools of medicine nationwide have capitalized on relationships with external health care and industry organizations to ensure their teaching, research, and patient care goals are met. Therefore, in addition to the University of Illinois at Urbana-Champaign and the Carle Health System, Tripp Umbach recommends a focused effort on engaging others in the community, region, and nation (such as the Mayo Clinic) to be involved in meeting the goals of the college. An example of a current relationship that demonstrates the interest external organizations have in each of the founding partners is the partnership between the Mayo Clinic and the University of Illinois at Urbana-Champaign. The Mayo Clinic designated the University of Illinois at Urbana-Champaign as its primary technology and genomics partner after a rigorous evaluation of other top engineering schools. Likewise, Carle Health System has demonstrated its ability to provide care and training for niche patient populations through its clinical care and teaching relationships with the Children's Hospital of Illinois. Further, the collaborative model of medical education and leveraging relationships outlined in this report will have the greatest potential to attract research revenue from the National Institutes of Health (NIH), other federal agencies, corporations, and foundations, especially in light of recent prioritization of team-based research. The University of Illinois at Urbana-Champaign is consistently among the top five universities in National Science Foundation (NSF) funding,

but ranks in the mid-70s in NIH funding. A new engineering-focused, collaborative college of medicine based in Urbana-Champaign will bring new federal dollars into the region and the state.

Recommendation #5: Ensure that the new highly-specialized college of medicine does not duplicate the existing UIC College of Medicine, but instead allows for extensive collaboration with the existing college of medicine.

As mentioned above, the development of an engineering-based school of medicine provides opportunities for complementary rather than competitive learning experiences for future physicians in the State of Illinois and provides opportunities to collaborate and expand Illinois presence in medical education and research. A key element in ensuring the success of the new school of medicine in support of the ongoing success of the existing UIC College of Medicine is to engage the University's Vice Chancellor for Health Affairs and Dean of Medicine as members of the Board of Directors for the new medical school. Involving University of Illinois leaders across medical school programs will ensure maximum collaboration and the greatest potential to increase NIH funding opportunities for the University of Illinois.

Tripp Umbach also believes that the development of a new private college of medicine in Urbana-Champaign provides an opportunity to enhance the existing College of Medicine in Chicago. As the new school is created, the UIC College of Medicine, already training the most diversified body of future practitioners in the nation, has the opportunity to leverage new technologies, through collaborations with the proposed new college of medicine in Urbana-Campaign, to establish itself as the national leader for addressing issues related to diversity in the health care industry and the delivery of urban health care services with an emphasis on addressing the needs of minority populations.

Tripp Umbach believes that by not requesting support from state General Revenue Funds (GRF) for the new college of medicine in Urbana-Champaign, more financial support will be available for the existing UIC College of Medicine. This support will allow the existing College of Medicine to take advantage of the emerging revolution in medicine, driven in large part by engineering innovations which are already transforming the ability to deliver drugs and develop health protocols targeting specific populations. Tripp Umbach believes that the Dean and staff at the existing UIC College of Medicine are in an ideal position to develop a strong partnership with the proposed independent college of medicine to:

- Conduct clinical trials that must address the diversity of physicians and their patients.
- Adapt and tailor bioengineering innovations to urban health care needs and conditions.

- Conduct clinical trials involving diverse populations in partnership with biotechnology start-up companies emerging from the new College of Medicine and based both in the Urbana-Champaign area and in the Chicago region.

In summary, the new independent college of medicine provides an opportunity for the existing University of Illinois Chicago College of Medicine to develop areas of strength and distinction while it pursues a broad education mandate spanning issues related to urban health, rural health, multiple locations and academic tracks, comprehensive research, and economic development both in Chicago and statewide. The partnership between the established public College of Medicine and a new engineering- and technology-focused college of medicine will allow each school to improve recruitment efforts for top students and faculty, as well as enhance philanthropic initiatives that are aligned with each school's distinct character.

Recommendation #6: Develop a detailed business plan that includes a sustainable funding model that does not require General Revenue Fund appropriations for medical education.

A detailed financial model and fund development strategy is required before the college of medicine program can be implemented. Detailed analysis of income and expenses will be required in a full business plan and financial model. Tripp Umbach recommends that such a business plan and financial model be completed on or before September 2014 to meet the timetable to open the new college of medicine in the fall of 2017.

Based upon Tripp Umbach's expertise as well as available data related to financial models for current and planned medical schools, Tripp Umbach recommends using the following broad parameters associated with a feasible new medical school:

- \$75 million over five years to cover start-up costs for the new school.
- \$25 million for initial facility upgrades during the start-up phase.
- A 200,000-square foot, highly-specialized college of medicine facility, costing approximately \$100 million, depending on configuration and equipment, to open in 2025.
- \$22 million in annual revenue to cover annual operating expenses when the school admits its first students in 2017, and \$47 million in annual revenue to cover annual operating expenses when the school is fully operational in 2021.

Tripp Umbach recommends that significant resources from private sources be secured to start and grow a successful venture. In addition to the \$100 million required for the start-up phase, an endowment with a corpus

of approximately \$200 million to ensure the long-term viability of the enterprise is necessary, as the school will need operational funding support each year to cover a funding gap between expenses and tuition, grants, contracts, and clinical revenue. While public medical schools have taxpayers to cover funding gaps, the new college of medicine will need to develop a foundation to address the lack of public funding. It is estimated that the new school, with small class sizes and an associated PhD program, must generate approximately \$8 million in additional funding annually before revenue from expanded clinical growth, expanded research, and reinvestment from commercial applications is fully realized. Additional funding will be needed from the Carle Health System, the University of Illinois at Urbana-Champaign, and external private donors to support the college of medicine program between 2021 and 2035.

Tripp Umbach recommends that the new college of medicine obtain revenue from the following sources:

- Tuition
- Grants and Contracts
- Clinical Revenue Sharing
- Philanthropy
- Commercial Revenue

It is also recommended that the financial plan include the development of a bioscience reinvestment fund created through income from a portion of earnings from the licensing of commercial applications of discoveries and the generation of incremental research revenue. These funds could be used for strategic program growth in key areas that support the mission of the new college of medicine. Recognizing that the new college of medicine is intended to enhance the national and international reputations of founding partners, external research awards and philanthropic contributions will be reported in such a way as to maximize reputational growth for each partner.

III. VALUE OF A NEW ENGINEERING- AND TECHNOLOGY-BASED COLLEGE OF MEDICINE SCHOOL

Value to the Carle Health System and the Community it serves:

The new college of medicine will further Carle Health System's mission of serving people through high-quality care, medical research, and education, and provides Carle with the opportunity to be the leader in transforming teaching, further integrating technology and medical research, providing team-based clinical education, and supporting its mission through commercialization of discovery. The new college of medicine will strengthen Carle's ability to serve as a tertiary clinical provider and advance the health of the population in the region.

- A new college of medicine located in Urbana-Champaign will provide Carle Health System with significant benefits related to new expertise of providers who will deliver care to patients of the health care system. Most importantly, the new school will create an environment to train and facilitate the development of physician leaders who will drive the necessary transformation from volume-driven, reimbursement-based care to value-driven care delivered through advanced technology and collaborative teams of providers.
 - This transformation, and its impact on cost and quality, will be especially important to Carle Health System as it manages all aspects of patient care within its delivery system, including its own health insurance company.
 - The partnership between Carle Health System and the University of Illinois at Urbana-Champaign will enable the new college of medicine to integrate education, innovation and patient care to address changes in health care delivery as a result of advances in technology and societal financial constraints.
- Carle's physician and research teams will partner with engineering experts to develop technologies that are critical for delivering high-quality and effective health care in the future. These technologies are anticipated to enhance Carle's current practice of evidence-based medicine for improving health, and to increase access to information to improve population health through ambulatory-based preventive medicine.
 - In addition to graduating physicians who will remain in Illinois to practice, the new college of medicine will attract and retain high quality clinicians who are interested in research as well as clinical care and choose to practice in an academic health center setting that allows them to do

both. This physician workforce impact is especially important in light of projected physician shortages due to the impact of the Affordable Care Act and the aging physician and patient population.

- Working in collaboration with nurses, allied health professionals, surgical technicians, and community colleges, the new college of medicine will also have a direct impact on the creation of a multi-layered workforce.
- Carle Health System, along with the University of Illinois at Urbana-Champaign, will become a destination for health care, offering primary and specialty care similar to the type of care found in premier medical communities nationally.
- Clinical trials conducted by the new college of medicine, in addition to Carle's existing clinical trials, will provide value to the Urbana-Champaign community, as well as an advantage to Carle Health System. These trials will position the health system as a destination for care by providing patients with access to cutting-edge treatments typically not available at non-academic health centers.
- Connection to engineering research provides opportunities for breakthrough research in medical devices, technology, clinical trials, and patient care models. The health system will offer innovative state-of-the-art care that draws national attention and enhances its reputation. Through this connection, Carle Health System will create new national best practices in clinical care and develop better preventive medicine protocols and population health management capabilities.
- Carle Health System will develop new technologies and teaching methods based on a team-based fully integrated health care model with a medical school, clinics, hospitals, and provider-owned insurance company (the only one in the state of Illinois).
- Carle Health System, along with its research partners, will be the springboard for future economic development in Urbana-Champaign and throughout the State of Illinois. These partnerships have the opportunity to launch new industries and add value to existing industries, creating high-paying jobs in health care, higher education, and related industries.
 - As a major employer in the Urbana-Champaign community, it is critical that Carle Health System maintains its ability to be a national leader in health care and to remain fiscally viable. The new college of medicine will allow Carle to continue its commitment to diversify, adapt to change, and be a strong community partner.

Value to University of Illinois at Urbana-Champaign:

- A core mission for the University is economic development. The new college of medicine is seen as important to the University's ability to contribute to the economic development of not only the Urbana-Champaign area, but also Central Illinois, Chicagoland, and the State of Illinois. The new college of medicine will enhance the University's ability to attract and retain faculty, research funding and conduct translational research to transform knowledge and creativity into economic growth for the state.
- The well-being and quality of life of the University will be improved through the development of the new college of medicine. A wider array of health services and cutting-edge clinical trials will improve the health care options of our employees and the larger community. Economic growth and job creation will inevitably lead to greater opportunities for dual-career couples, better transportation infrastructure, improved services, and other quality of life measures.
- A core mission of the University is education. Creating an independent college of medicine based on engineering and technology in Urbana-Champaign will provide the region with a quality academic physician training program which will address the current and future health care issues of the region and beyond.
 - The integration and development of innovative and cutting-edge technology will be embedded in the future of medicine through the preparation of new physician-engineers and physician scientists. It is projected that these new physicians will elevate the image and the profile of the University of Illinois on a grander scale.
 - Newly graduated physicians will be trained to understand technology and its interaction and implications within medicine. Physicians from the new college of medicine will help shape new standards of patient care and treatment methods. They will also be trained to work in multidisciplinary teams utilizing team-centric approaches that are optimized to deliver better health care in a more efficient manner to patients both locally and nationwide.
- Engineering and computational pre-eminence represents a 150-year mark of excellence for the University of Illinois at Urbana-Champaign, and the convergence of engineering and medicine dictates that the future of engineering schools will be tied to their integration with health care research and development. Co-locating the new college of medicine and the College of Engineering on the same campus will ensure the integration of engineering and technology-based health sciences and will provide the College of Engineering with a competitive advantage relative to cutting-edge research and

superior educational experiences. The location of the new college of medicine on the same campus as the College of Engineering will also attract funding resources and leverage the assets of both schools. In particular, the University will be able to capture significant research funding currently going to the top College of Medicines who are partnering with the College of Engineering.

- Close engagement with Carle physicians in integrated teams and clinical settings will expose the faculty and students to critical health care issues. This exposure will guide research and innovation toward objectives that will have maximum impact and benefit to society. Furthermore, the partnership will enable access to Carle's comprehensive and integrated financial and clinical data, allowing extensive data analytics, knowledge management, and computational science discovery with specific application to transforming health care delivery and outcomes.
- The new college of medicine will provide an immediate competitive advantage. The private partnership with a partner equally committed to the delivery of better health care at lower costs will be unique and distinct from the start. Furthermore, the proposed partnership will provide the flexibility and nimbleness required for the partnership to respond quickly to changes to stay ahead of its academic peers.
- The new college of medicine will allow the University of Illinois at Urbana-Champaign to strengthen its competitive position among its aspirational peers. Among the University's top 10 ranked public research university peers, UC Berkeley and the University of Texas at Austin are the only other institutions that do not have colleges of medicine. The University of Texas at Austin is in the process of acquiring a college of medicine, and UC Berkeley has strong connections to the nearby UC San Francisco and Stanford Colleges of Medicine, as well as a large and established School of Public Health, which competes effectively for NIH funding, on its campus.

Value to UIC College of Medicine:

- The delivery of medicine has been significantly transformed by engineering innovations and the ability to develop health protocols targeting specific populations. The UIC College of Medicine will be in an ideal position to:
 - Become the new school's partner for clinical trials involving diverse populations and conducted by biotechnology start-up companies based in Urbana-Champaign and Chicago. These clinical trials will address the diversity of physicians and their patients.
 - Become the new school's partner in adapting innovations to urban health care needs and conditions.

- Become the new school's partner, through its Peoria and Rockford campuses, in adapting innovations to rural health care needs and conditions.
- Increased partnership and collaborative opportunities will allow for additional NIH funding potential for the school and the state overall.
- The new college of medicine provides an opportunity to transform the state's medical education system into two strongly defined schools, each with its own unique focus and purpose.
 - The new partnership will allow for improved recruitment of top faculty and students and an associated improvement in philanthropic activities. Both efforts will contribute to the University's mission and strategic objectives.

Value to State of Illinois

- The new college of medicine will provide additional federal research opportunities and development funds for the state of Illinois.
 - The new college of medicine will attract federal funding for the state of Illinois, which currently ranks 17th in the nation for the amount of federal research and development dollars received annually (\$2.6 billion in 2010 according to a study by the Rand Corporation), as well as for the University of Illinois, which currently ranks 8th in the nation (\$1.2 billion in 2010).
- The new college of medicine will build on the foundation established by the University of Illinois Research Park and the newly created Digital Manufacturing and Design Innovation Institute, and will therefore strengthen the development of a vital Urbana-Champaign-Chicago corridor of technology innovation as an economic development driver for the State of Illinois.
- The new college of medicine and the recently announced ARCHES partnership between OSF Healthcare and the College of Engineering at the University of Illinois at Urbana-Champaign will initiate the creation of an I-74 Medical Innovation Corridor through collaboration with health care systems in Urbana, Peoria, Champaign, Bloomington, Normal, and Danville.
 - The Corridor will be an incubator to help create high-paying jobs and make the entire region more attractive to major companies and medical technology industries.
 - The location of the new college of medicine in this Corridor offers an opportunity to apply engineering-driven innovation to transform rural health care services.

- The new college of medicine will establish itself and the State of Illinois as the national leader in medical innovation and technology.
 - The Illinois Medical District (IMD), University of Chicago, Northwestern University, UIC College of Medicine, and Loyola University, along with Chicago-based investments in technology infrastructure, have created the foundation for the state to become the national leader in medical innovation and technology. The new college of medicine in Urbana-Champaign will further solidify Illinois' position.
- Academic medical centers are currently collaborating with the University of Illinois at Urbana-Champaign because of its engineering and technology expertise. A new college of medicine in Urbana-Champaign will allow talent and expertise to remain in Illinois.
 - Colleges of Medicine at Stanford University, Johns Hopkins University, Washington University, Duke University, and Vanderbilt University—all top 10 medical schools as ranked by the National Institutes of Health (NIH) funding-- have developed ongoing research collaborations with University of Illinois at Urbana-Champaign engineering and/or science faculty. A new college of medicine will create partnerships on the same campus with University of Illinois at Urbana-Champaign faculty, keeping faculty talent and expertise in the state of Illinois.

IV. SUPPORT FOR RECOMMENDATIONS

Key Finding #1: The state of Illinois lags behind other states in academic medicine and bioscience economic development.

As part of the feasibility study, Tripp Umbach conducted an assessment of the strength of the academic medical industry, both statewide and in Chicago, compared with other states and metropolitan areas. The analysis was conducted using two national databases, both developed by Tripp Umbach on behalf of the Association of American Medical Colleges (AAMC). The two national databases include: 1) The total economic impact of all U.S. allopathic medical schools (2012) and 2) The total economic impact associated with federal biomedical research on all 50 states (2011).

These databases and comparative reports, which have been maintained and updated by Tripp Umbach and the AAMC since 1995, provide the most accurate data available for making comparisons on the size of the academic medical industry as a whole and specifically on federally-sponsored biomedical research.

State by State Academic Medical Industry Impact Rankings

While the state of Illinois ranks 7th among all states relative to the total economic impact of academic medicine, generating \$28.7 billion in total economic impact in 2012 (AAMC), other states with similar populations generate a significantly higher economic impact. For example, Pennsylvania generates an annual impact of \$47 billion, a 50 percent greater impact than Illinois. The economic impact of academic medicine in the smaller state of Massachusetts was \$38.8 billion in 2012. The table below depicts the economic impact of academic medicine for the top 10 states. (Table 2)

Table 2: Economic, Employment, and Government Revenue Impact for AAMC Members (2012)

States	Rank	Total Economic Impact	Total Employment Impact	Total Government Revenue Impact
New York	1	\$74,151,538,606	430,743	\$4,819,032,979
California	2	\$49,201,512,761	264,046	\$2,921,073,540
Pennsylvania	3	\$47,033,121,373	272,640	\$2,882,702,406
Massachusetts	4	\$38,760,110,682	195,154	\$2,234,308,702
Texas	5	\$35,825,649,773	228,513	\$1,327,689,312
Ohio	6	\$32,314,079,590	209,047	\$1,884,550,734
Illinois	7	\$28,732,944,479	155,233	\$1,478,370,705
Florida	8	\$24,490,233,642	166,676	\$1,211,629,554
Michigan	9	\$23,051,327,122	133,120	\$1,585,794,455
North Carolina	10	\$17,330,838,088	120,578	\$ 942,220,251

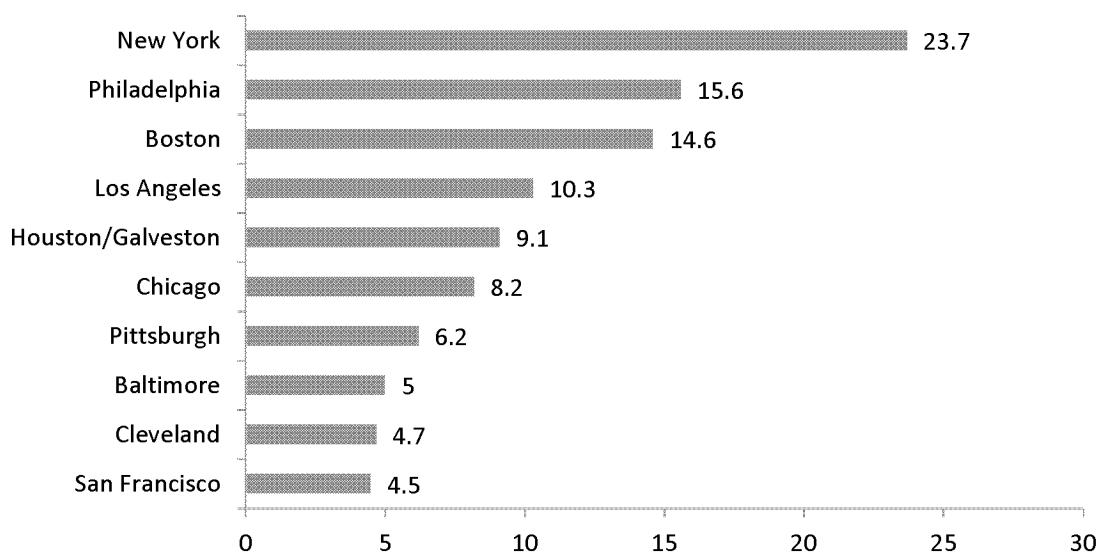
Note: Since 1995, the states of Texas and Ohio have surpassed Illinois in total economic impact.

Academic Medical Industry Rankings by Metropolitan Area

Tripp Umbach also compared the economic impact of academic medicine at the metropolitan level and found that Chicago had the 6th largest academic medical center industry cluster in 2012, as measured by the combined economic impact of all medical schools and teaching hospitals on the regional economy. In 1995, Chicago was the 4th largest metro area; Houston and Los Angeles surpassed Chicago over the past 15 years. In 2012, AAMC estimated the total economic impact of all academic medicine in metropolitan Chicago at \$8.2 billion. The largest markets, as measured by the total economic impact of academic medicine, are New York (\$23.7 billion), Philadelphia (\$15.6 billion) Boston (\$14.6 billion), Los Angeles (\$10.3 billion) and Houston (\$9.1 billion). (Chart 1)

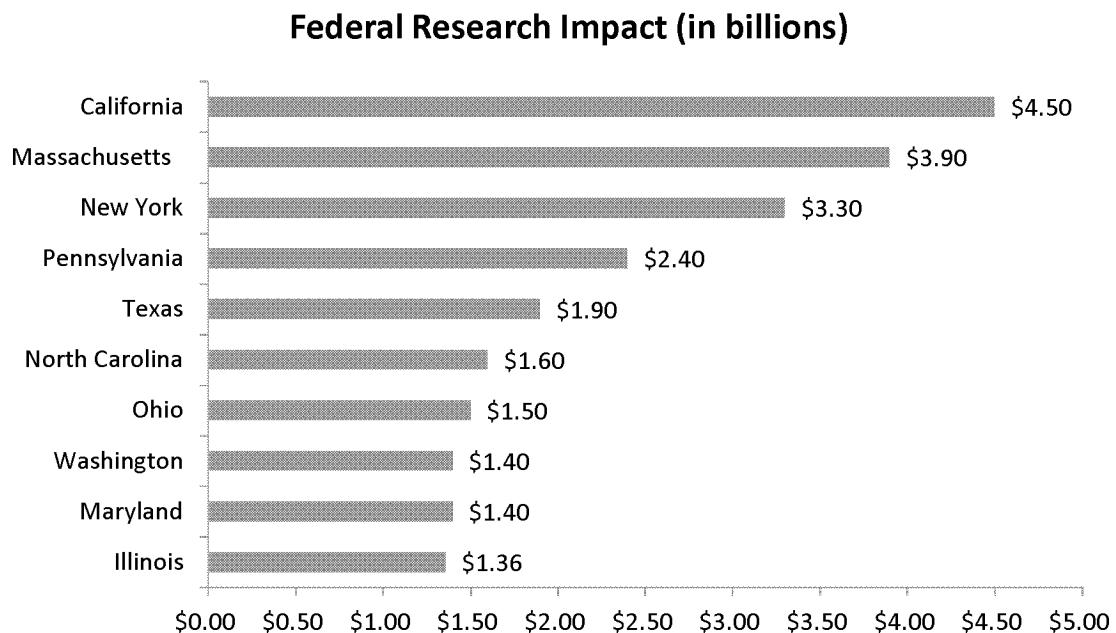
Chart 1: Top 10 Academic Health Markets

Top 10 Academic Health Markets (in billions)



While the size of the economic impact associated with academic medicine in Chicago is larger than the impact of smaller metropolitan areas such as Pittsburgh (\$6.2 billion), Baltimore (\$5 billion), and Cleveland (\$4.3 billion), the economic impact of academic health is significantly larger on a per capita basis in these smaller markets. Perhaps most telling in terms of the need to add a new research-intensive college of medicine at the University of Illinois at Urbana-Champaign is that the State of Illinois ranks 10th among all states relative to the economic impact associated with federally-sponsored research. (Chart 2)

Chart 2: Federal Research Impact



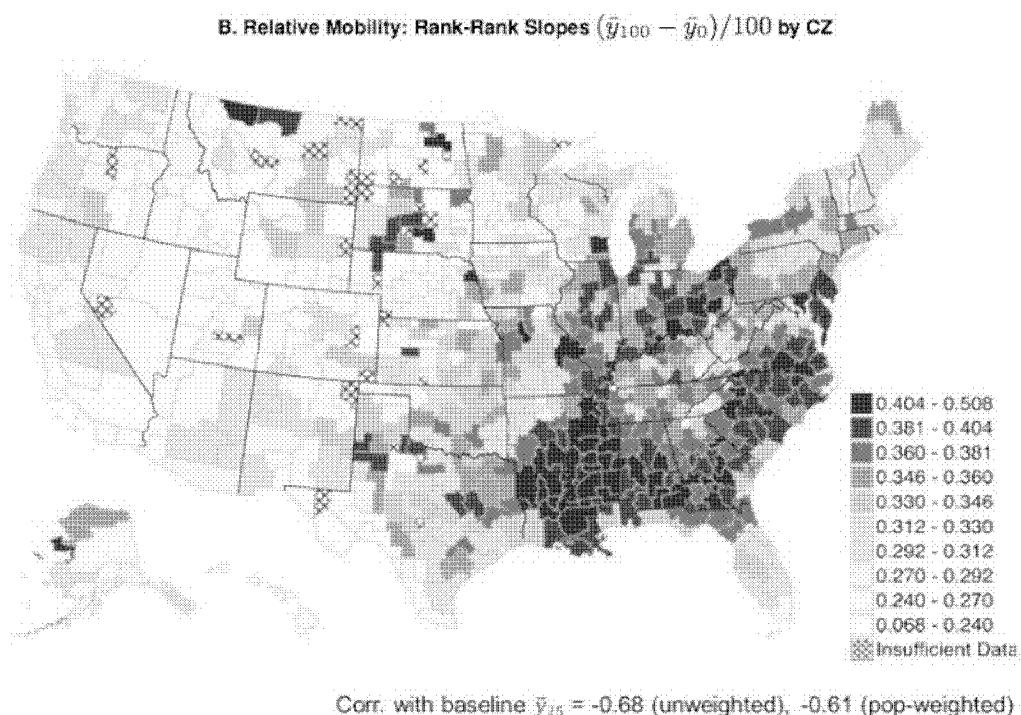
Illinois ranked lower than several smaller states such as Massachusetts, North Carolina, Washington, and Maryland. On a per capita basis, only Texas has a lower per capita economic impact of federal research than Illinois, and the state of Massachusetts has nearly five times the economic impact from all federal sources. (Table 3)

Table 3: Per Capita Impact of Federal Research Funding

State	Federal Research Impact (in billions)	Impact Population (in millions)	Dollars per Capita
Massachusetts	\$3.90	6.7	\$582.00
Maryland	\$1.40	5.9	\$237.28
Washington	\$1.40	7	\$200.00
Pennsylvania	\$2.40	12.8	\$187.50
New York	\$3.30	19.6	\$168.40
North Carolina	\$1.60	9.9	\$161.61
Ohio	\$1.50	11.6	\$129.30
California	\$4.50	38.3	\$117.50
Illinois	\$1.36	12.9	\$105.42
Texas	\$1.90	26.5	\$71.70

Finally, underscoring the close relationship between science and economic development, a recent landmark report, “The Geography of the American Dream”, ranked all 50 states and metropolitan areas on economic opportunity as measured by the upward mobility of its residents. Although southern states and metropolitan areas ranked the lowest, the State of Illinois and traditional Rust Belt cities in the Midwest ranked below the Western United States and the Northeast relative to the ability for young people to move into higher income brackets. (Map 1)

Map 1: Relative Mobility



Researchers from Harvard University and UC Berkeley also ranked metropolitan regions according to “intergenerational upward mobility” to identify cities where children are able to move ahead and do better than their parents. Salt Lake City, Pittsburgh, San Jose, Boston and San Francisco, all places with significant bioscience economic development, were identified as “capitals of the land of opportunity.” (Table 4)

Children living in Chicago in a family in the bottom fifth of national income have a 6.5 percent chance of moving to the top fifth, according to the study. Chicago was ranked 36 out of 50 markets in terms of intergenerational upward mobility. Tripp Umbach believes that transformational projects, such as the one contemplated by Carle

Health System and the University of Illinois at Urbana-Champaign, will serve to improve upward mobility in the State of Illinois as a whole.

Table 4: Metropolitan Regions Ranked by Intergenerational Upward Mobility

Rank	City
1	Salt Lake City
2	Pittsburgh
3	San Jose
4	Boston
5	San Francisco
6	San Diego
7	Manchester, NH
8	Minneapolis
36	Chicago

Key Finding #2: The new independent college of medicine has the opportunity to attract new federal funding into the state of Illinois.

Building on the first key finding, Tripp Umbach believes that a new independent college of medicine provides the University of Illinois as a whole, and specifically the Urbana-Champaign campus, with the opportunity to tap into a larger federal research funding pool. Tripp Umbach's review found that the University of Illinois at Urbana-Champaign campus is consistently among the top five university recipients of National Science Foundation (NSF) funding, but ranks in the middle (77th out of all recipients) for National Institutes of Health (NIH) funding.

Tripp Umbach reviewed the success of the University of Illinois at Urbana-Champaign in capturing NSF funding, as well as the amount of NIH funding that is currently going to other U.S. medical schools that have relationships within these grants with the Urbana-Campaign campus. Tripp Umbach assumes that if a new, independent, engineering and technology-based four-year college of medicine was located on the Urbana-Champaign campus, a significant increase in the percentage of total NIH funding would be realized by the University of Illinois, based upon the millions of dollars a month in NIH funding that is going to other college of medicine collaborators.

NIH funding to universities in Fiscal Year 2012 equaled \$18.3 billion, of which the University of Illinois at Urbana-Champaign received less than one-half of one percent (\$71 million). Within the much smaller NSF funding pool provided to universities, equaling \$4.4 billion in 2012, the University of Illinois at Urbana-Champaign received a full 3 percent (\$126 million).

NIH recently prioritized the need to change the way clinician scientists are educated by creating the National Center for Advancing Translational Sciences (NCATS) as the newest of its 27 Institutes and Centers. The NCATS was created to transform the translational science process so that new treatments and cures for disease can be delivered to patients faster. As students at the new independent college of medicine will be trained by active clinician-researchers working in engineering and basic and behavioral science departments, the opportunity to attract significant NCATS funding will exist from the onset of the new program. This model of medical education will teach students how to translate advances in technology and science into the clinical environment, precisely the transformation that the NIH is demanding.

Key Finding #3: Carle Health System and the University of Illinois at Urbana-Champaign must move quickly to capitalize on the benefit of this revolutionary college of medicine model.

Tripp Umbach's analysis of U.S. medical schools indicates that the recommended independent college of medicine will be among the first engineering and technology-based medical school. Such a unique program will be designed to take advantage of the revolutionary advances in engineering, technology, and quantitative sciences to further biomedical research and education. The recommended college of medicine model has the opportunity to tie innovations in technology to improvements in human health in a way that has never been done before by a new program. Therefore, the new program must be viewed from the start as much more than a medical education training program.

Tripp Umbach has identified the following benefits to both the Carle Health System and the University of Illinois as they move forward with plans to develop an independent medical school:

University of Illinois at Urbana-Champaign

A principal benefit of a new college of medicine program is that such a program can be focused on the challenges and realities of 21st century medicine, and not constrained by historical models of education, patient care, and research. The University of Illinois, through this new independent partnership program, must quickly establish itself as one of the leading players in what will become the future of academic medicine. While there have been many new medical schools established in the United States since 2005, only the partnership program in Virginia between Carillion Health System and Virginia Tech has a mission similar to the recommended model included in this report. The University of Texas at Austin, one of the institutions that the University of Illinois' Board of Trustees identifies as a "dashboard peer," has announced that the first class of its Dell Medical School will be accepted in 2016. Of top 50 NIH-funded medical schools, only Michigan, Stanford and Purdue are located

at universities that also have top 10 engineering programs. While all three of these institutions are currently organized around a traditional college of medicine program, all three are in transition to be positioned for the next generation of teaching, training, discovery, and healing to meet future needs. The new model of medical school will enhance opportunities for external funding.

The window for the University of Illinois at Urbana-Champaign will not remain open for long, as top-tier expertise in engineering, the key link in this transformation, can be purchased by all top-tier medical schools and hospital systems. Tripp Umbach believes that poorly performing colleges of medicine will have a difficult time attracting top engineering talent. The top 10 medical schools in the United States already have relationships with the University of Illinois at Urbana-Champaign. Therefore, it is important that the University of Illinois recognize the need to develop a program that has exceptionally strong integration between medicine and advanced science, as there are multiple examples nationally where proximate universities have strong partnerships¹.

Carle Health System

Tripp Umbach cautions that the window of opportunity for partnership between the Carle Health System and the University of Illinois at Urbana-Champaign is exceptionally time-limited. The Mayo Clinic and the Cleveland Clinic have strategies in place to maintain leadership positions in research-driven personalized medicine. While Mayo and Cleveland do not have a world-class engineering school within their institutions, they have already overcome this deficiency by partnering with strong engineering programs. For example, in the case of Mayo Clinic, they have partnered with the University of Illinois at Urbana-Campaign (www.mayoillinois.org). The Mayo Clinic has also partnered with the University of Minnesota for nearly 15 years through the Minnesota Biotechnology Partnership, and the Cleveland Clinic has a similar relationship with Case Western Reserve University. It must also be noted that other emerging health systems throughout the United States, such as Greenville Health System, Lehigh Valley Health Network, INOVA, and Geisinger Health System, are developing similar college of medicine partnerships to achieve national prominence in personalized medicine.

While the new Dell Medical School in Austin is anticipated to have a strong focus on computational science, the proposed college of medicine outlined in this report will pair engineering, technology, and computational science with Carle Health System's fully integrated health care delivery system. Tripp Umbach believes that the

¹ Notable partnerships between medical schools and universities include: Harvard University and Massachusetts Institute of Technology, University of Pittsburgh and Carnegie Mellon University, and Emory University and Georgia Tech.

Carle Health System must capitalize immediately on the opportunity to partner with the University of Illinois to develop technology, engineering, and computation solutions to meet the demands of a new paradigm of health care delivery. Since governmental units at all levels, employers, payors, and patients are demanding outcomes-based medicine and health care delivery which incorporates behavioral influence on patient wellness through technology, the Carle Health System and the University of Illinois will have exceptional support for this program locally, regionally, statewide, and nationally.

Key Finding #4: A separately accredited, independent college of medicine with an innovative curriculum is critical to ensure the long-term viability of the new medical school.

An important consideration in Tripp Umbach's recommendation for a highly specialized independent college of medicine with a class size appropriate for a fully integrated health system is the need for a revolutionary curriculum where all teachers, learners, trainees, researchers, scientists, and innovators (entrepreneurs) are under the institutional infrastructure. Therefore, the development of an innovative curriculum which responds to the changes that have occurred in health care over the past decade and also addresses established and ever-changing LCME requirements will be challenging in the short term, but vital to the success of medical education in the long term. As referenced in Section V, Consideration of Other Options, Tripp Umbach does not believe that developing a LCME-approved "track" of the existing state-supported UIC College of Medicine program can effectively accomplish what a separately accredited program could achieve, especially as the new program will have a high degree of integration with science and technology programs in Urbana-Champaign.

Tripp Umbach recommends that the University of Illinois at Urbana-Champaign continue to gather curriculum input from key stakeholders throughout the region, state, and nation as the development of the new school continues. The traditional college of medicine curriculum educates physicians through an outdated approach for addressing disease progression and symptoms (examination, diagnostics, and treatment) and emphasizes memorization versus self-directed discovery. The new school's curriculum must be rooted in the convergence of medicine and engineering, computer sciences, quantitative sciences, and technology to teach the human body as an integrated system. This understanding of the human body as an integrated system is critical to the analytical, problem-solving skills needed to be a successful physician. Engineering technologies and approaches should be incorporated throughout the curriculum. Examples include:

- In microbiology, the curriculum can provide an understanding of microbes and engineering approaches to the alteration of genomes and biological circuits.

- In clinical training, the curriculum can incorporate bioreactor use, 3D printing, and advanced analysis techniques.
- In computer sciences, the curriculum can include data mining techniques to create patient care guidelines.
- Student experiences can include interactions not only with physicians and patients, but also with engineers and new innovations for advancing medical care.

The curriculum will have immediate societal and economic impacts as students at the new independent college of medicine gain an understanding of how to influence behavioral change relative to the use of technologies such as wearable sensors to address issues such as obesity. The new curriculum will teach students how to use tools, such as electronic health records and wearable technology, to track patient behavior and outcomes, including cost of care. Students will also learn to work in team environments with other clinicians, such as physician assistants and nurses, so that health care can be delivered by the right provider in the right setting.

The unique nature of a partnership between the Carle Health System and the University of Illinois at Urbana-Champaign will allow the new independent college of medicine to impact outcomes in a way that organizations without an integrated delivery and financing system cannot. This integrated system will provide all of the components necessary to address the changes in health care delivery required by technology advances, patient-driven care, and the Affordable Care Act, and these components will allow the new independent college of medicine to transform medical care from volume-driven to value-driven care. The Urbana-Champaign community can serve as a pilot for the rest of the country by training physicians to provide the most appropriate care in the most appropriate setting.

Physicians who graduate from the new independent college of medicine will be trained to incorporate analytical techniques and innovations into a human systems approach to delivering health care. It is recommended that the curriculum allow physicians to:

- Practice problem-solving and analytical thinking critical to understanding disease etiology and developing a new foundation for health management.
- Leverage computational science, analytics, and personalized therapeutics.
- Be experts in the use of data synthesis techniques and new technologies.
- Adopt and develop innovations through collaboration with interdisciplinary teams comprised of bioscientists, engineers, and clinicians. Despite the growth in inter-professional training in

recent years, the vast majority of health professionals are never exposed to collaborative care until they enter the workforce. The result is that hospitals, clinics, and other practice sites have to retrain individuals to work in teams. Tripp Umbach believes inter-professional education takes significant commitment from all levels of academic leadership in medical, nursing, and other health professional schools to make it successful. Tripp Umbach acknowledges that the recommendation to develop a medical and science education and research campus will not be without logistical challenges as schools have different calendars, and different professions take varying approaches to teaching the same material. However, the goal is to improve the health of the public by preparing professionals to work in more effective ways. Studies have shown that inter-disciplinary collaboration has the capacity to impact both health care providers and patients. The Joint Commission currently reports that almost 70 percent of patient adverse events are related to the lack of collaboration and communication between providers. Interdisciplinary collaboration plays an important role in the elimination of errors and duplications in care, and in the clarification of roles. When collaboration takes place among nurses, physicians, and patients, each person understands the goals and the processes through which to attain the goals. Avoidable re-hospitalizations are frequent, costly, burdensome for patients and families, and fortunately, actionable for improvement. Many re-hospitalizations within 30 days of discharge are considered potentially avoidable if communication was more effective and care better coordinated. Accreditation agencies such as the Joint Commission have now put collaboration practice guidelines into place for health care organizations, and are requiring their implementation for accreditation.

- Understand the capabilities of virtual learning environments and computational modeling and analytics. Graduates will leverage these in designing the “ICU of the future” and the “Operating Room of the future”, evaluating new medical delivery systems, and delivering care to patients in remote locations.

Key Finding #5: Building on the existing economic impact of the University of Illinois and the Carle Health System, the new independent college of medicine will have substantial economic impact on the region and state of Illinois.

Medical education is a major driver of the U.S. economy, as medical schools and teaching hospitals generated nearly \$600 billion in economic impacts, supported more than 3.3 million jobs, and generated \$22 billion in state

government revenue in 2012². As outlined earlier in this report, the academic medical industry in Illinois generated more than \$28.7 billion in the state's economy in 2012, and supported more than 155,000 jobs directly and indirectly.

Expanding medical education through the model outlined above represents an important step in the economic development in Northeast Illinois, the Chicago region, the state of Illinois, and neighboring states. The project sponsors, the Carle Health System and the University of Illinois at Urbana-Campaign, already provide a significant source of economic, employment, and government revenue impact to the region and to the state of Illinois. Tripp Umbach estimates, based on national standards for hospitals and universities, that the Carle Health System and the University of Illinois at Urbana-Champaign add more than \$3 billion to the regional economy annually and support more than 20,000 jobs directly and indirectly in the region³.

It is also important to recognize in this feasibility study that UIC College of Medicine and University of Illinois Hospital in Chicago are important economic engines for the city of Chicago and the state of Illinois.

In 2012, according to the AAMC, the total economic impact of UIC College of Medicine was \$1.48 billion. AAMC data indicates that the UIC College of Medicine supported 8,682 jobs statewide. The following data illustrates the economic impact of UIC College of Medicine and Medical Center in Chicago in 2012. (Table 5)

Table 5: Total Economic Impact⁴

Entity	Economic Impact (2012)	Employment Impact (2012)
UIC College of Medicine	\$1.48 billion	8,682
University of Illinois Medical Center	\$1.22 billion	5,044
Total	\$2.7 billion	13,728

² Association of American Medical Colleges, "The Economic Impact of Medical Schools and Teaching Hospitals, 2012.

³ Tripp Umbach estimates that total employment on the University of Illinois at Urbana-Campaign campus and Carle Foundation Hospital equals approximately 13,500 full or part-time jobs.

⁴ Source: Association of American Medical Colleges, 2012.

Impacts Associated with the New College of Medicine

Tripp Umbach estimates that the total economic impact of the new college of medicine enterprise will exceed \$1 billion annually by 2035 when the school is at full maturity. The new school is expected to sustain more than 7,600 jobs statewide by 2035. This impact will stem from the spending by the medical school, the Carle Health System, and related research institutes on capital improvements, goods and services, the spending of staff and faculty, the spending of medical trainees, and the spending (external to the institution) of visitors to the proposed school. This impact is conservative in its projected spending related to capital expenditures needed to operate a medical school, such as equipment, clinical supplies, and non-salary related expenditures for the medical school.

The economic benefits generated by the development of a new research-intensive college of medicine extend beyond the direct impact of its operations. The number of benefits generated in the region as a result of the college of medicine will include newly constructed neighborhoods and schools to support the anticipated increase in families relocating to the region, and communities championing the expansion of dedicated education, greater choices for entertainment, and improved transportation from Urbana-Champaign to Chicago, the east and west coasts. In addition to the construction of new homes and schools to support projected population increases, the need for new retail, banking, and commercial opportunities will serve as additional economic benefits for the region.

The proposed project will enhance the economic environment of the Urbana-Champaign metropolitan area because the quality of health care resources has a favorable impact upon the decisions made by business owners who are looking to locate or relocate companies. An economic impact analysis completed by Tripp Umbach for the Association of American Medical Colleges (AAMC) shows that states with strong medical schools and teaching hospitals stimulate research and biomedical industry business development outside of the medical college. Economic impact studies completed by Tripp Umbach for the AAMC since 1995 show a direct correlation between the presence of medical schools and a growing economy. Data presented in other sections of this report show that states with research-intensive medical schools have the strongest economies on a per capita basis. The new research-intensive college of medicine will be attractive to medical-related companies who are likely to establish a greater focus within the area, seeking the competitive advantage of proximity to a major academic medical center.

Tripp Umbach agrees with the conclusions of a recent Business Development Cluster report indicating that a new college of medicine at the University of Illinois at Urbana-Champaign campus would accelerate economic development and job creation in Central Illinois and the state as a whole through the emergence of a vibrant

biomedical and bioengineering business cluster. Although the college of medicine will be designed to graduate a relatively small number of physicians each year, graduates will make significant impacts in the development of medical innovations. It is important to point out that many of the graduates will move to other cities, including Chicago, where job opportunities exist and where quality of life options are varied and numerous. Because of their unique knowledge base, they will impact organizations in Chicago, all of Illinois, and the entire nation, bringing recognition for the state of Illinois' leadership in innovation. The proposed new college of medicine will have multiple economic and social benefits as it leverages revolutionary advances in engineering, technology, and quantitative sciences to further biomedical research and education.

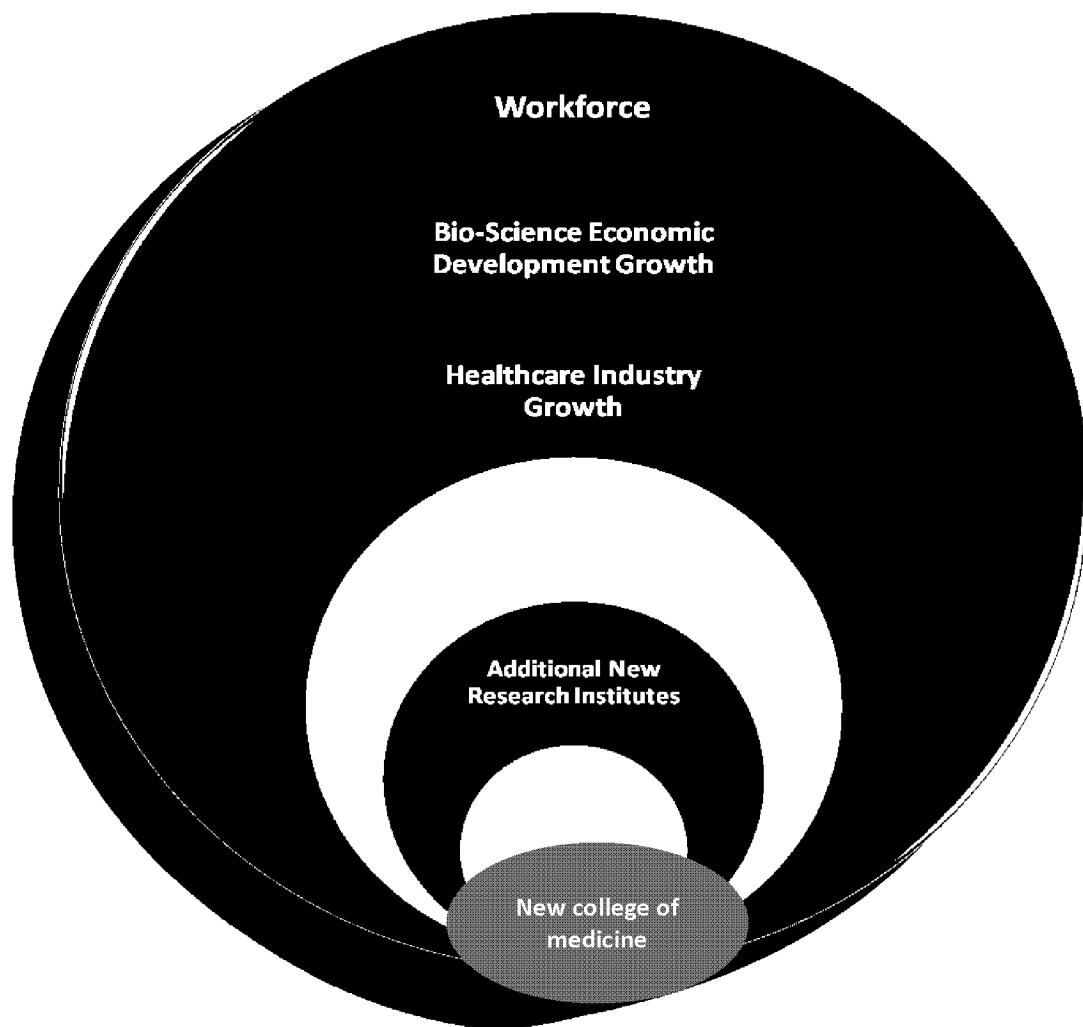
The convergence of medicine and engineering in Urbana-Champaign is already resulting in significant startup company formation, and this type of activity will be enhanced through the presence of additional physician scientists, research integration with clinical sites, and increased clinical trials. Examples of startup companies formed in the last five years by faculty from the University of Illinois at Urbana-Champaign are included in Table 6, and details for these and additional companies launched in this time period can be found in Appendix B. Many of these companies have already secured significant venture capital and are collaborating with a number of medical institutions, including Carle, to conduct clinical trials. (Table 6)

Table 6: Examples of Startup Companies Formed by Faculty in Past Five Years

Company	Core Technology	Origin	Additional Notes
Diagnostic Photonics	Tissue Microfracture Imaging	Electrical & Computer Engineering	Clinical trials completed at Carle & John Hopkins
MC10	Wearable systems, home diagnostics, remote monitoring	Material Science and Engineering	Major venture capital backing
Daktari	CD4 counting technology of point-of-care tools	Bioengineering	Major venture capital backing
Metabolomx	Colorimetric sensor array for detection of lung cancer from breadth	Chemistry and the Beckman Institute	Has partnered with Cleveland Clinic
Paxent LLC	Data analytics	Computer Science	Has partnered with Carle
Vitruvian Biotech	Image-guided nanoparticle drug delivery	Bioengineering	Initial research completed at the Carle Biomedical Research Center

The proposed development of the new college of medicine represents a “rock hitting the pond” (see Image 2 below) as it creates significant additional economic and social benefits for the Urbana-Champaign region, Chicagoland, and the state of Illinois over the next 20 years. (Image 2)

Image 2: Multiple Impacts of the Campus



The new college of medicine and its partnerships with the Carle Hospital Foundation, the University of Illinois, and other regional health care organizations, private businesses, and research-related organizations are the springboard for future economic development in Urbana-Champaign and throughout the state of Illinois. These partnerships have the opportunity to launch new industries and add value to existing industries, creating new high-paying jobs in health care, higher education, and related industries.

Detailed Economic Impact Findings:

Additional impacts created by the construction and operations of the recommended new medical education research enterprise will further stimulate the economic growth of the region via increased economic activity, as well as the unique impacts of an expanded medical college, such as increased research activities and funding from sources outside the region. Tripp Umbach estimates that the impact of the recommended college of medicine option has the potential to grow from \$39 million annually, the current level of impact, to more than \$1 billion in annual economic impact when the program is at full maturity in 2035. (Table 7)

Table 7: Economic Impact of the New College of Medicine (in millions)

Category of Impact	Existing COM at Urbana campus (2014)	New COM - 2021 (after start-up)	2030	2035 (Maturity)
College of Medicine Program Impacts	\$26.4	\$83.2	\$210.5	\$390
<i>Research Program Impacts (included in College of Medicine Program Impacts Listed Above)*</i>	\$1.8 <i>(\$1 million in expenditures)</i>	\$28.4 <i>(\$15 million in expenditures)</i>	\$162 <i>(\$90 million in expenditures)</i>	\$270 <i>(\$150 million in expenditures)</i>
Clinical Program Impacts	\$5.3	\$16.8	\$60.5	\$120
Commercialization Impacts**	\$7.3	\$60	\$480	\$900
Total Economic Impact*	\$39.0	\$160.4	\$750.5	\$1.4 billion

*Research Program Impacts are included in College of Medicine Program Impact Totals.

**Commercial impacts include direct, indirect, and induced jobs from the college of medicine as well as bioscience industry cluster growth.

***Impacts do not include the significant economic and employment impacts that will result from the construction of facilities related to the new college of medicine.

In addition to the business volume impact the proposed college of medicine and research campus is expected to generate, the proposed campus will also create a substantial number of jobs throughout the region. The employment impact of the proposed campus will also be comprised of direct and indirect impacts. Direct employment impact represents full-time equivalent positions created directly by the proposed college. The positions included in the direct employment for this analysis include the faculty, support staff, and residents who will be employed in the region specifically due to the development and operation of the regional college of

medicine campus. Indirect employment impact represents full-time equivalent positions created as a result of the proposed college's spending and the spending of faculty, staff, students, and visitors.⁵

While the current University of Illinois Chicago College of Medicine at Urbana campus supports approximately 215 jobs in the region, the new college of medicine is expected to increase employment in the region dramatically over the next 20 years. The employment impact of the proposed enterprise will be over 5,600 jobs by 2035 when the program is at full maturity. (Table 8)

Table 8: Employment Impact of the New College of Medicine (total Jobs created directly and indirectly in the state's economy)

Category of Impact	Existing COM at Urbana campus (2014)	New COM 2021 (after start-up)	2030	2035 (Maturity)
College of Medicine Program Impacts	145	460	1,290	2,167
<i>Research Program Impacts (included in College of Medicine Program Impacts Listed Above)</i>	10	160	900	1,500
Clinical Program Impacts	30	95	340	690
Commercialization Impacts**	40	335	2,750	5,000
Total Economic Impact*	205	795	3,480	7,857

*Research Program Impacts are included in College of Medicine Program Impact Totals.

** Commercial impacts include direct, indirect, and induced jobs from the college of medicine as well as bioscience industry cluster growth.

***Impacts do not include the significant economic and employment impacts that will result from the construction of facilities related to the new college of medicine.

Tripp Umbach believes that the economic impact of the new college of medicine presented below will add to the current economic impact of the Chicago-based hospital and University of Illinois Chicago College of Medicine in Chicago. Furthermore, Tripp Umbach projects that the economic impact of the University of Illinois Chicago College of Medicine and hospital in Chicago will grow over the next several years. (Table 9)

⁵ Examples of indirect jobs created in support of the proposed college of medicine include teachers at schools attended by the children of employees, affiliated researchers, and financial service professionals.

Table 9: Total Projected Economic Impact of UIC College of Medicine and the New College of Medicine (2021 and 2035)

Entity	Economic Impact (2012)	Economic Impact (2021)	Economic Impact (2035)
UIC College of Medicine	\$1.48 billion ⁶	\$1.78 billion ⁷	\$2.34 billion ⁸
University of Illinois Medical Center	\$1.22 billion	\$1.47 billion	\$1.92 billion
New College of Medicine		\$160 million	\$1.4 billion
Total	\$2.7 billion	\$3.3 billion	\$5.6 billion

Social Impacts related to the recommended program:

At a time when severe physician shortages have been predicted and the Affordable Care Act is increasing health care access to over 30 million citizens, it is imperative to improve the health care delivery system and develop a means to provide services at lower costs. States across the U.S. are evaluating their health care systems and the opportunity for new education, which has led to the development of 15 new medical schools since 2006, after none had opened in the previous two decades. Our proposed recommendations present an opportunity for the state of Illinois to be at the forefront of the health care industry for the 21st Century by:

- Reinventing health care around revolutionary advances in engineering and technology to further biomedical research, biomedical practices, and education, and therefore modernizing the education of physicians from wellness through treatment with an integrated system which transforms and improves outcomes of care while expanding the economy.

⁶ Includes impact of the Urbana campus.

⁷ Based on 2 percent growth rate for the UI College of Medicine over the period.

⁸ Based on 2 percent growth rate for the UI College of Medicine over the period.

V. CONSIDERATION OF OTHER OPTIONS

Tripp Umbach conducted interviews with leaders representing higher education, health care, industry, and government over an intensive two-month period to develop and test various medical school development models. The recommended model, outlined in greater detail in the first section of this report, calls for the development of a specialized engineering-based college of medicine in Urbana-Champaign through a corporate structure created by the Carle Health System and the University of Illinois at Urbana-Champaign.

Two other models analyzed within the feasibility study are presented below, including 1) developing a new college of medicine through stronger alignment with UIC College of Medicine, specifically expanding the current Urbana-Champaign campus to capitalize on the opportunities outlined in other sections of this feasibility study – health care and economic transformation, and 2) developing a larger regional college of medicine with partner hospital systems in both Urbana-Champaign and Peoria (1-74 Corridor Program).

Campus Expansion of University of Illinois College of Medicine at Urbana-Champaign Regional Campus:

Under this option, the University of Illinois at Urbana-Champaign would not pursue a separately accredited college of medicine in Urbana-Champaign, nor enter into a partnership with the Carle Health System, but would continue to host the University of Illinois Chicago College of Medicine regional campus on the Urbana-Champaign campus and work with that entity to make this campus more aligned with the needs and strengths of the Urbana-Champaign campus.

Tripp Umbach acknowledges the following advantages and challenges associated with this option:

- **State Support** – This model ensures that UIC College of Medicine remains the largest allopathic college of medicine in the U.S. and continues its mission of training physicians statewide. However, being a large college of medicine is not a goal shared equally among campuses, as the size of the student body is less important in a science and technology-focused program. Also, since 2005, there has been a 34 percent increase in the number of medical students educated in the United States and only a 2 percent growth in training sites for graduate medical education. The challenge in 2014 and beyond will be the development of more residency positions--not more medical students. Tripp Umbach's recommended model does include the provision that 125 first-year students continue to receive their education at the Urbana-Champaign campus.

Statewide college of medicine models with multiple regional campuses are not as critical today as in the past when most patients were taken to big cities for care. There are very limited clinical or educational

benefits of a network of college of medicine campuses when 95 percent of all care in the region can be supported by a hospital such as the Carle Hospital Foundation. The old model of needing a college of medicine and an associated large specialized urban teaching hospital to support education and clinical care is not a reality in 2014. The care that the Carle Health System cannot provide is transferred to top health care centers regionally, such as Mayo Rochester, Washington University in St. Louis, and Northwestern in Chicago.

- **Culture** – While acknowledging the difficulty to retrofit a 19th/20th century medical education model and training program into such a unique research and technology model geared for the 21st century, Tripp Umbach believes that having a single “floating” college of medicine that can be claimed by both campuses as “their” college of medicine has merits. Such a model, with a dual-reporting structure to Chicago and Urbana-Champaign and a Dean’s office in both locations, is more desirable than a model to expand the four-year college of medicine out of the University of Illinois at Urbana-Champaign College of Medicine within the current structure, where the Chicago campus has control of regional campuses. However, changes would be required in areas ranging from accreditation, institutional culture, and significantly increasing state support for public medical education.

UIC College of Medicine has one of the lowest per-pupil NIH funding of any college of medicine in the country, and as such will have difficulty aligning with the University of Illinois at Urbana-Champaign, which seeks to have a heavily research-focused program with a small class size and one of the highest research per-pupil populations in the country.

Tripp Umbach also questions the ability to generate needed philanthropic support in the Urbana-Champaign region for what will be perceived as a Chicago-based college of medicine due to the significant distance and differences in key donor populations between the two regions.

Finally, Tripp Umbach questions how a “common campus” college of medicine model could be sustainable, when years of little or no collaboration suggest that UIC College of Medicine leadership will not embrace a new focus for the Urbana-Champaign campus that builds on the strengths of the University of Illinois at Urbana-Champaign. More importantly, the flow of funds between campuses and executive decision-making functions (requirements of the LCME) do not suggest to Tripp Umbach a single college of medicine will be able to fulfill two substantially different missions with excellence and national leadership. We do believe that both the Chicago and Urbana-Champaign campuses can achieve national leadership through two separately focused colleges of medicine.

- **Ensuring Two Strong Colleges of Medicine** – Tripp Umbach believes that a new engineering-focused college of medicine at the Urbana-Champaign campus through an independent partnership with the Carle Health System will result in more funding opportunities for new capital investment in Chicago in areas of drug discovery, disparities/population health management, and biotech economic development. UIC College of Medicine already trains the most diversified body of future practitioners in the nation. It now has the opportunity to establish itself as the national leader in addressing diversity in the health care industry and focus on addressing urban health care services, including alignment with the Illinois Medical District (IMD) strategic plan that specifically sets out clinical trials leveraging the diverse patient population of the IMD.

Tripp Umbach concludes that expansion of the University of Illinois at Urbana-Champaign College of Medicine, as discussed above, is more costly to the state of Illinois than a new independent college of medicine organized as a private non-for-profit corporation. Expanding the Urbana campus through the current state-supported medical education model will cost taxpayers in initial capital and ongoing operational support, while at the same time limiting the amount of new research funding in core areas such as Engineering, Biotechnology, and Computational Science that is likely to flow into a new medical college.

Independent State-Supported New College of Medicine with Campuses in Urbana-Champaign and Peoria:

Tripp Umbach evaluated the option for the University of Illinois to develop a separately accredited public four-year college of medicine with a larger class size (150+ students per class) with educational and clinical campuses in both Urbana-Champaign and Peoria, involving multiple health systems as affiliates.

Tripp Umbach acknowledges the following advantages and challenges associated with this option:

- **Capacity** – Tripp Umbach's financial analysis found that a regional college of medicine with larger class size would enable a new college of medicine to have greater immediate, but not necessarily long term financial stability. However, this model assumes that the new college would have a medical education/physician workforce focus, with less resources being directed to research. Peoria, a larger regionally-based health system and more fully developed college of medicine infrastructure, has the opportunity with Carle Health System and other systems to become a national leader in medical education, remote health care delivery, simulation, and population health management – due to the larger scale with more than 1.5 million residents along the I-74 corridor. Tripp Umbach believes that a

regional delivery system with partnership campuses in Peoria and Urbana-Champaign has the opportunity to integrate new medical training that focuses on population health management and remote care with telepresence and other technologies such as bioinformatics and biomarkers that impact care delivery.

- **Mission and Cultural Alignment** – Tripp Umbach acknowledges the strengths that a newly formed regional college of medicine could bring to the region and its institutions. However, findings from interviews suggest that the distance between Peoria and Urbana-Champaign would provide challenges for collaboration. Additionally, the most significant concern expressed by stakeholders is the negative financial and educational impact that such a model would present to the University of Illinois at Chicago College of Medicine.
- **Regional Economic Development** – While collaborative opportunities with hospitals and medical centers in Peoria, Urbana-Champaign, and Danville open up the possibility of an I-74 Medical Innovation Corridor, Tripp Umbach believes that regional economic development partnerships can occur within the context of the recommended independent new medical college.
- **Timing** – Due to the complexity of multiple state institutions, the development of such a model would require several additional years of planning, which would compromise the potential economic impact. Partnering with a community health care organization maximizes the flexibility of the program and allows for expedient decision making. The years of additional planning could also result in foregoing the immediate uniqueness and competitive advantage that will be secured if Carle Health System and the University of Illinois at Urbana-Champaign moved quickly as recommended by Tripp Umbach.

VI. CONCLUSIONS

Tripp Umbach believes that sufficient human and financial resources can be developed over the next three years to ensure the successful launch of a specialized college of medicine through an equal partnership with the Carle Health System and the University of Illinois at Urbana-Champaign. Ideally, the new college of medicine will enroll students by the fall of 2017, and become fully operational with all classes and programs by 2021.

Tripp Umbach developed this conclusion based upon the following factors:

1. ***Independent Program with Strong Partners:*** An independent private structure builds upon the strengths of two strong organizations without taking funding away from an established state-supported medical college. The Carle Health System's structure, as a financially strong, fully integrated health system with a teaching hospital, outpatient clinics, and an insurance company, as well as high quality of care scores, provides a strong foundation upon which to build a successful independent medical college. As the only fully integrated health care system in Illinois, the Carle Health System has the integrated medical records system and data analytics capability to improve health outcomes of individual patients and larger patient populations. It is important to highlight the need to develop and maintain strong partnerships between Carle Health System and the University of Illinois at Urbana-Champaign, a key factor to success. The University of Illinois at Urbana-Champaign is consistently among the top five universities in National Science Foundation (NSF) funding, and a new engineering-focused college of medicine based in Urbana-Champaign will immediately be positioned to bring new federal dollars into the region and the state of Illinois for innovative multidisciplinary research integrating patients, scientific research, and advanced technology-driven programs on the University of Illinois Urbana-Champaign campus.
2. ***Opportunity for Federal Funding:*** Tripp Umbach reviewed the success of the University of Illinois at Urbana-Champaign in capturing National Science Foundation (NSF) funding, as well as the amount of National Institutes of Health (NIH) funding that is currently going to other U.S. medical schools that have relationships within these grants with the Urbana-Campaign campus. Based upon the millions of dollars of NIH funding that are provided each month to medical schools that have collaborations with the University of Illinois at Urbana-Champaign, Tripp Umbach assumes that if a new independent engineering and technology-based four-year college of medicine were located on the Urbana-Champaign campus, a significant increase in the percentage of total NIH funding would be realized by the University of Illinois. As students at the new independent college of medicine will be trained by

active clinician-researchers working in engineering and basic and behavioral science departments, the opportunity to attract significant National Center for Advancing Translational Sciences (NCATS) funding will exist from the onset of the new program. This model of medical education will teach students how to translate advances in technology and science into the clinical environment, precisely the transformation that the NIH is demanding.

3. ***Revolutionary Curriculum:*** The new college will be among the first nationally to differentiate itself through the fully integrated development of a revolutionary curriculum based upon collaboration between medicine, engineering, technology, and quantitative sciences. This differentiation provides the college with an immediate competitive advantage over existing national and international medical schools. Tripp Umbach believes that a smaller, highly specialized medical college, developed through a private-public partnership between the University of Illinois at Urbana-Champaign and the Carle Health System, is preferable to a traditional clinically-focused multi-hospital distributed training model which is better suited to meet physician workforce needs. The development of an innovative curriculum which prepares physicians to deliver appropriate care in an inter-professional, patient-centered environment along with ready access to the next generation of sensors, materials, imaging, and robotics will produce physician scientist leaders who will train other community-based physicians who graduate from the University of Illinois and other medical schools throughout the United States and internationally.
4. ***Economic Impact Growth Statewide:*** The new college of medicine and its multiple partnerships with the Carle Health System, the University of Illinois, and other regional health care organizations, private businesses, and research-related organizations, is the springboard for future economic development in Urbana-Champaign and throughout the state of Illinois. These partnerships have the opportunity to launch new industries and add value to existing industries, creating new high-paying jobs in health care, higher education, and related industries. Tripp Umbach believes that the economic impact of the new college of medicine will add to the current economic impact of the University's Chicago-based hospital and medical college. Furthermore, Tripp Umbach projects that the economic impact of the Chicago-based College of Medicine and hospital will grow over the next several years through partnerships with the new medical college, resulting in the combined economic impact of all entities growing from \$2.7 billion currently to \$5.6 billion in 2035.
5. ***The new college of medicine will strengthen the UIC College of Medicine:*** The Chicago-based public college of medicine will be supported and strengthened as it advances its important mission during the development of the new independent private medical college. A key element to strengthening the

current UIC College of Medicine is to engage the University's Vice Chancellor for Health Affairs and Dean of Medicine on the Board of Directors for the new medical college. This will ensure maximum collaboration, especially important as a collaborative approach has the most potential to increase NIH funding for the University Illinois. Tripp Umbach believes that by not requesting state General Revenue Funds support for the new college of medicine, more financial support will be provided for UIC College of Medicine to take advantage of the emerging revolution in medicine, driven in large part by engineering innovations. This revolution is already transforming the ability to deliver medicine and develop health protocols targeting specific populations.

APPENDIX A: INTERVIEWEE LIST

Tripp Umbach completed in-depth interviews with community leaders in health care, higher education, industry, government, and economic development organizations. The following table provides a listing of the organizations and the title of the individuals that were engaged. The next table lists the individuals in alphabetical order by last name. Interviews with business leaders and health care leaders are an important part of the feasibility study process, as strong community support is essential in assessing a project of this magnitude.

Table A. Titles of individuals grouped by organization.

Organization	Title
Carle Health System	CEO
	EVP and Chief Medical Officer
	VP of Research and Medical Education
	Executive Director, Research Institute
	Surgery/Surgical Oncology Carle Foundation Hospital, Founder Oracle Bioscience
	Surgical Oncologist, Biomedical Research Center
	Medical Director, Diagnostic Services and Strategic Development
	Senior Vice President, System Strategic Development
	Business Development
Horizon Hobby	Chairman of the Board
Illinois Innovation Council	Member
Illinois Medical District Commission	Executive Director
	President and Director of Strategic Engagement
Immuven	CEO
Jump Trading Simulation & Education Center	Chief Medical Officer
Naurex	President and CEO
Northwestern Feinberg School of Medicine	Assistant Professor of Medicine and Associate Director of the Medical Informatics Program,
OSF Healthcare	Chief Medical Officer for Simulation
Serra Ventures, LLC	CEO

Organization	Title
University of Illinois	Interim Vice President for Health Affairs
	President
University of Illinois Foundation	Vice Chancellor for Institutional Advancement and Senior Vice President
University of Illinois at Urbana-Champaign	Chancellor
	Associate Chancellor for Public Affairs
	Associate Chancellor for Corporate and International Relations
	Associate Vice Chancellor for Institutional Advancement
	Director of Strategic Communications, Office of Public Affairs
	Vice Chancellor for Academic Affairs and Provost
	Associate Chancellor & Vice Provost, Budgets and Resource Planning
	Associate Vice Chancellor for Research, Interim Director of the Division of Biomedical Sciences
	Director, Research Park
	Associate Provost for Strategic Planning and Assessment
	Former Associate Dean of Clinical Affairs
	Associate Director for Research, Coordinated Science Laboratory
	Vice Chancellor for Research
	Associate Chancellor
University of Illinois College of Medicine	Dean, College of Medicine
University of Illinois College of Medicine at Peoria	Regional Dean, College of Medicine

Organization	Title
University of Illinois College of Medicine at Urbana-Champaign	Associate Dean for Research
	Professor and Director, Medical Scholars Program
	Associate Dean of Student Affairs & Medical Scholars Program
	Associate Dean for Clinical Affairs and G/CME
University of Illinois Hospital and Health Sciences System	CEO
	Associate Vice President for Population Health and Professor of Medicine and Public Health

Table B. Individuals engaged listed in alphabetical order by last name.

Interviewees	Organization
Ilesanmi Adesida, PhD	Vice Chancellor for Academic Affairs and Provost University of Illinois at Urbana-Champaign
Michael Andrechak	Associate Chancellor & Vice Provost, Budgets and Resource Planning, University of Illinois at Urbana-Champaign
Dimitri T. Azar, MD	Dean College of Medicine University of Illinois College of Medicine
Joseph Barkmeier, MD	Medical Director, Diagnostic Services & Strategic Development Carle Foundation Hospital
Jerry Bauman, PhD	Interim Vice President for Health Affairs University of Illinois
Bryan Becker, MD	CEO University of Illinois Hospital and Health Sciences System
Stephanie Beever	Senior Vice President, System Strategic Development
Rohit Bhargava, PhD	Professor Beckman Institute for Advanced Science and Technology
Stephen Boppart, MD, PhD	Professor Beckman Institute for Advanced Science and Technology
Mike DeLorenzo, PhD	Associate Chancellor University of Illinois at Urbana-Champaign

Interviewees	Organization
James Dougherty, MD	Vice President of Research and Medical Education Carle Foundation Hospital
Bob Easter, PhD	President University of Illinois
Jennifer Eardley, PhD	Associate Vice Chancellor for Research, Interim Director of the Division of Biomedical Sciences University of Illinois at Urbana-Champaign
Laura Frerichs	Director, Research Park University of Illinois at Urbana-Champaign
Matt Gibb, MD	EVP and Chief Medical Officer, Carle Physician Group
James Hall	Associate Dean for Student Affairs & Medical Scholars Program University of Illinois College of Medicine at Urbana-Champaign
Chris Harris	Director of Strategic Communications, Office of Public Affairs University of Illinois at Urbana Champaign
Tim Hoerr	CEO Serra Ventures, LLC
Robin Kaler	Associate Chancellor for Public Affairs University of Illinois at Urbana Champaign
Anna Keck, MD	Executive Director, Research Institute Carle Foundation Hospital
Pradeep Khanna	Associate Chancellor for Corporate and International Relations University of Illinois at Urbana Champaign
Abel Kho, MD	Assistant Professor of Medicine and Associate Director of the Medical Informatics Program, Northwestern Feinberg School of Medicine
David Krantz PhD	Professor Biochemistry CEO Immuvan
Jerry A. Krishnan, MD, PhD	Associate Vice President for Population Health and Professor of Medicine and Public Health University of Illinois Hospital and Health Sciences System
Stig Lanesskog	Associate Provost for Strategic Planning and Assessment University of Illinois at Urbana-Champaign
James Leonard, MD	CEO Carle Foundation Hospital
William Marshall	Associate Dean for Clinical Affairs and G/CME, University of Illinois College of Medicine at Urbana-Champaign
Normand Paquin, PhD	Associate Director for Research, Coordinated Science Laboratory University of Illinois at Urbana-Champaign

Interviewees	Organization
Dan Peterson, JD	Vice Chancellor for Institutional Advancement and Senior Vice President University of Illinois Foundation
Partha Ray, MD	Surgery/Surgical Oncology Carle Foundation Hospital, Founder Oracle Bioscience Carle Foundation Hospital
Norbert Riedel, PhD	President and CEO of Naurex, Illinois Innovation Council
Warren Ribley	Executive Director, Illinois Medical District Commission
Sara L. Rusch, MD	Regional Dean, College of Medicine University of Illinois College of Medicine at Peoria
Peter Schiffer, PhD	Vice Chancellor for Research University of Illinois at Urbana-Champaign
James Slaugh	Professor and Director, Medical Scholars Program, University of Illinois at Urbana-Champaign
Rick Stephens	Chairman of Horizon Hobby Community Relations Lead for the College of Medicine
Magesh Sundaram, MD	Surgical Oncologist, Biomedical Research Center Carle Foundation Hospital
Rich Tapping, PhD	Associate Dean for Research UIC College of Medicine at Urbana
Molly Tracy	Associate Vice Chancellor for Institutional Advancement University of Illinois at Urbana-Champaign
John Vozenilek, MD	Chief Medical Officer, Jump Trading Simulation & Education Center Chief Medical Officer for Simulation, OSF Healthcare
Phyllis Wise, PhD	Chancellor University of Illinois at Urbana-Champaign
Jennifer Woodard, JD	President and Director of Strategic Engagement Illinois Medical District Commission

APPENDIX B: EXAMPLES OF BIOTECHNOLOGY SPINOFFS

The following provide more details on examples of biotechnology spinoffs generated by faculty at the University of Illinois at Urbana-Champaign.

- Diagnostic Photonics, a company founded by two University of Illinois at Urbana-Champaign Electrical and Computer Engineering Professors, developed an imaging technology that generates diffraction-corrected images of tissue microstructure by solving the mathematical equations governing the physics of light at high speed and transforming defocused images into in-focus ones. This approach brings imaging to the point of care and places the power of optical imaging in the hand of the physician. Clinical trials with breast cancer patients have been completed with Carle and Johns Hopkins University.
- MC10 is commercializing products in wearable systems, home diagnosis and remote monitoring, and medical devices based on the pioneering inventions of stretchable and flexible silicon-based electronics developed by a University of Illinois at Urbana-Champaign Professor. MC10 is producing interventional catheters with ultra-low profile, nanometer-thin sensors that deliver real-time feedback to physicians during procedures. MC10 is backed by investors such as North Bridge, Braemar Energy Ventures, Aberdare Ventures, Windham Venture Partners, TERAWATT Ventures, and Medtronic Ventures.
- Daktari, which utilizes technology developed by a University of Illinois at Urbana-Champaign Bioengineering Professor, employs CD4 counting technology for point of care diagnosis and treatment of HIV and Hepatitis C. The company has raised \$30 million in venture capital and employs 55 people.
- Metabolomx, co-founded by faculty at the University of Illinois at Urbana-Champaign, has developed technology enabling the identification of lung cancer from a patient's breath. The technology, based on a breath analysis system, is a novel, proprietary colorimetric sensor array. The company has partnered with the Cleveland Clinic.
- Glucosentient, founded by a University of Illinois at Urbana-Champaign Chemistry Professor, developed a technology that transforms personal glucose meters into devices that quantitatively and conveniently detect non-glucose targets.
- Oracle Biosciences is developing a single gene-based clinical assay for diagnosis and prognosis for basal-like breast cancer for use in clinical diagnostics and subtyping. Research is being completed at Carle.
- Phi Optics, Inc., founded by a University of Illinois at Urbana-Champaign Electrical and Computer Engineering Professor, is an optical microscopy company that developed a disruptive technology –

Quantitative Phase Imaging (QPI) – that provides highly accurate, fast, and inexpensive imaging of live cells and tissues.

- Exalt Diagnostics, founded by a University of Illinois at Urbana-Champaign Bioengineering, Electrical and Computer Engineering Professor, developed FluoroBoost, a technology that measures the presence and concentration of dozens of proteins circulating inside the human body. The technology utilizes a nanostructured photonic crystal surface to increase the output of any surface-based fluorescence assay by more than 500 times.
- Accelerated Genomics, founded by researchers from the University of Illinois at Urbana-Champaign's National Center for Supercomputing Applications, Institute for Genomic Biology, and the Department of Computer Science, accelerates the performance of gene alignment and sequencing through algorithms and the use of graphics processing units (GPUs). The technology enables the processing of genomic data at a rate four to six times faster than previous technology.
- Paxent LLC, founded by a University of Illinois at Urbana-Champaign Computer Science Professor, is collaborating with Carle on health care data analytics based on outcomes of the Strategic Health IT Advanced Research in Security (SHARPS) and related projects in health information technology.
- Phonticare, founded by an MD/PhD Electrical and Computer Engineering Professor at the Beckman Institute, is developing a line of portable biomedical optical imaging products using optical coherence tomography (OCT), a non-invasive optical imaging technique capable of providing high-resolution three-dimensional images of tissue structure in real-time.
- Vitruvian Biotech, founded by a University of Illinois at Urbana-Champaign Bioengineering faculty member, is developing image-guided targeted nanoparticle drug delivery. The initial research was completed at the Carle Biomedical Research Center, a collaboration between Carle and the University of Illinois at the Mills Breast Cancer Institute.

APPENDIX C: TRIPP UMBACH QUALIFICATIONS

Tripp Umbach is a national leader in feasibility analysis, economic impact studies, and consultation services for universities, hospitals, academic medical centers, and biomedical organizations. Tripp Umbach has provided consultation and economic impact analysis services for more than 50 medical education expansion clients, and for virtually every college of medicine that has been created or expanded during the past 10 years. Since 1995, Tripp Umbach has completed national studies measuring the economic impact of all allopathic medical schools and more than 400 teaching hospitals for the Association of American Medical Colleges (AAMC), making Tripp Umbach the most qualified firm to assess the feasibility and economic impact of a new or expanded college of medicine or hospital campus. In 2013, 50 of the top 100 academic medical centers ranked by *U.S. News & World Report* were active clients of Tripp Umbach. Tripp Umbach has completed individual studies for more than 75 established academic medical centers, 500 hospitals, and more than 200 universities since 1990.

Company Information

Address: 2359 Railroad St. #3701, Pittsburgh, PA 15222

Telephone: 412.281.2313

Fax: 412.281.9946

Website: www.trippumbach.com



From: Phyllis Wise [REDACTED]
Sent: Sunday, August 10, 2014 12:58 PM
To: Paul Umbach
Subject: Re: How did your meeting with [REDACTED] go?

Thanks so much Paul. For both your emails. I'll let you know about my meeting with [REDACTED]. It's great that you have emailed Jim. We had a short conversation this week. He's dealing with doubting physicians who have been treated like second class citizens in the University's previous efforts to partner with them and are worried that the new governance structure putting the NewCOM directly under UIUC will allow us to have too much power. He's also dealing with his board of directors who want to be sure that every penny invested will go toward the NewCOM and not be siphoned off to pay for other functions of the university unrelated to the COM.

In the meantime, we are dealing with faculty who are only familiar with academic organizational structures that are completely in the university and have never dealt with a partnership like this one. Our statutes do not deal with this. In addition, we are having issues related to how to balance the bottom line for the financial plan.

I am not worried yet...

Looking forward to talking with you soon.

Phyllis

Sent from my iPad

> On Aug 10, 2014, at 10:32 AM, Paul Umbach <PUmbach@trippumbach.com> wrote:
>
> Hey friend -- you will see that I also sent an update to JIM at the same time. I am learning! :)
>
> Paul O. Umbach
> Founder and President
> Tripp Umbach
> 2359 Railroad St. #3701
> Pittsburgh, PA 15222
> Corporate Headquarters: 412.281.2313
> Cell Number: [REDACTED]
> Fax Number: 412.281.9946
> www.trippumbach.com
>
> "Turning ideas into action for 25 years"
>
>
> -----Original Message-----
> From: Phyllis Wise [mailto:[REDACTED]]
> Sent: Sunday, August 10, 2014 10:06 AM
> To: Paul Umbach
> Subject: How did your meeting with [REDACTED] go?
>
> Paul,
>

> I am meeting with [REDACTED] tomorrow afternoon. Would you please let me know how your meeting with him went so that
I am prepared for mine.

>

> Thanks,

> Phyllis

>

> Sent from my iPad

From: Jennifer Woodard [REDACTED]
Sent: Sunday, August 10, 2014 8:19 PM
To: Phyllis Wise
Subject: Re: Did you see this???

I think that I have developed the capacity to "cherry pick" the talent and circumvent the idiots ☺ Not the optimal situation -but necessary in the current environment. I do so hope that the next 6-12 months brings relief in the form of more talented leadership for both our President and for the key leadership roles at UIC - that would inure to the benefit of the U of I as a whole.

Meanwhile, THANK YOU for your support.

On Sun, Aug 10, 2014 at 1:21 PM, Phyllis Wise [REDACTED] wrote:

And I, who is singularly focused on my issues, didn't even think to offer the same for you. But please know, if there is anything I can do, you must let me know. You have told me that UIC has been hard to work with. With all that is going on, I would think that you will have to go about your important business without their input/interference/delay tactics. Imagine if you had [REDACTED] as one of your commissioners, as [REDACTED] had recommended...or actually don't get a headache thinking about that!

Sent from my iPad

On Aug 10, 2014, at 2:05 PM, [REDACTED] wrote:

Ugh!! I just want you to avoid the land mines, and I will do all I can to help.

Sent from my iPhone

On Aug 10, 2014, at 12:40 PM, Phyllis Wise <[REDACTED]> wrote:

I didn't even think about the impact on the IMD. What a mess all around.

Sent from my iPad

On Aug 10, 2014, at 11:28 AM, [REDACTED] wrote:

I have kept [REDACTED] apprised, and he is thus far still interested in the potential for transformation....but who knows??!!

Yes, the land mines in Chicago you do not need. The mess is also affecting our IMD programmatic efforts, and that makes me angry. Just trying to support the [REDACTED] et al who represent future potential if we can keep them through this ugliness.

Sent from my iPhone

On Aug 10, 2014, at 8:27 AM, Phyllis Wise <[REDACTED]> wrote:

I worry about losing stars too and even whether people like [REDACTED] will be willing to put their toes, much less their heart and mind, in this cesspool - health sciences enterprise is a very large part of UIC - potentially a jewel in its crown. If figures out all the politics and that decisions are made based on politics, bordering on unethical politics, I'm afraid [REDACTED] say that this is not the next great step in his career path.

Selfishly, I wonder whether all of this will impact our proposal to establish a COM in U-C. Personally I want to get us disassociated with this mess as soon as we can. We need to not have our campus associated in any way with what is going on in Chicago.

Sent from my iPad

On Aug 10, 2014, at 9:11 AM, [REDACTED] wrote:

From a conversation I had with Chambers on Tuesday - who had spoken with Bob, it appears that Bob is taking a hands-off "this is a campus matter" approach. Do not know exactly what is going on. When I spoke with Ed on Monday, he said the BOT told PAM

[REDACTED] Ed felt [REDACTED] Do not know about new [REDACTED] appointment. Just a colossal mess. Worry more about losing stars.

Sent from my iPhone

On Aug 10, 2014, at 7:23 AM, Phyllis Wise <[REDACTED]> wrote:

But do you think that [REDACTED]

Sent from my iPad

On Aug 10, 2014, at 8:18 AM, [REDACTED] wrote:

No...[REDACTED]

[REDACTED] I have never seen nor experienced the leadership disaster that is UIC today.

Sent from my iPhone

On Aug 10, 2014, at 5:41 AM, Phyllis Wise <[REDACTED]> wrote:

[REDACTED]

Sent from my iPad

On Aug 10, 2014, at 12:14 AM, [REDACTED] wrote:

[REDACTED]

Sent from my iPhone

On Aug 9, 2014, at 10:10 PM, Phyllis Wise <[REDACTED]> wrote:

I missed this announcement sent to me from Meena Rao, who is the chair of the search for the chancellor at UIC and a friend of mine. It sounds really crazy: Avijit as Head of the hospital (a geographer and former dean of the COB and now Lon as the VP Corporate and Community Relations for the VP Health Affairs. What is going on?????

Sent from my iPad

Begin forwarded message:

Here is the
announcement -

Lon Kaufman, who will step down August 15 from his administrative position as Vice Chancellor for Academic Affairs and Provost, will assume a new role as Assistant Vice President for Corporate and Community Relations in the Office of the Vice President for Health Affairs. His appointment will be effective August 16.

In this new position, Dr. Kaufman will provide assistance and consultation and pursue strategic relationships with Illinois' healthcare economic development organizations. He will report to the Interim Vice President for Health Affairs.

Dr. Kaufman has considerable familiarity with the greater health communities and can integrate perspectives to enhance the corporate and community relations for the Office of the Vice President for Health Affairs. His distinguished 30-year career at the University has been marked by his dedication to UIC's urban mission and his efforts on behalf of the University's diverse students, faculty and staff. We look forward to working with him in his new role.

Dr. Kaufman has served in a variety of leadership positions as UIC evolved into a leading urban public research university. In collaboration with the Chancellor, as Provost he focused on supporting student success, diversity, academic excellence, faculty development and institutional advancement.

As Vice Provost for Planning and Programs from 2008 to 2011, he led the development of UIC College Prep, a health-science charter school within the Chicago Public School system. He also guided strategic planning initiatives, including the Diversity Strategic Thinking Document, the Diversity Strategic Plan, and the Learning Outcomes Assessment Program.

A plant biologist whose research focuses on the regulation of gene expression, signal transduction and crop productivity, Dr. Kaufman has received continuous federal funding since his arrival at UIC in 1985. His recent work also received support from the Illinois Soybean Growers Association.

He served as Director of Graduate Studies for the Department of Biological Sciences from 1993 to 1996 and as Department Head from 1998 to 2003. That year he became the founding Vice Provost for Undergraduate Affairs and Dean of the Honors College, a position he held for five years.

A graduate of Queens College of the City University of New York, Dr. Kaufman earned his Ph.D. from the State University of New York at Stony Brook. He was a postdoctoral fellow at the Carnegie Institution of Washington.

Please join us in congratulating Dr. Kaufman on his new position.

Sincerely,

Jerry L. Bauman
Interim Vice President for Health Affairs

Paula Allen-Meares
Chancellor
John Corbally
Presidential Professor

From: Phyllis Wise [REDACTED]
Sent: Monday, August 11, 2014 8:47 PM
To: Paul Umbach; James.Leonard@Carle.com
Cc: Beth Paul; Ha Pham
Subject: Re: I had a very productive phone call this morning with [REDACTED]

Dear Paul,

[REDACTED] was supposed to come to Champaign to meet with me this afternoon. But after his phone call with you, he called my office and said that he did not feel we needed to have the meeting. I still called him back and he said basically the same thing he said to you: he wants to be kept informed and really wants to be part of this. He feels left out, but your conversation convinced him that it was not intentional.

You did a great job and I think we are back on track with [REDACTED]

Best,
Phyllis

On Monday, August 11, 2014 1:37 PM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Dear Team:

My call with [REDACTED] was successful. I spent the first half of the call explaining why we were not formally in touch during the feasibility study and business planning phases. He understands and was appreciative of my open and honest reasons that I also spelled out in my recent email to him. His only concern is that he and [REDACTED] are now far "behind" and will need to play a lot of catch up to be considered as full partners on the research side. I assured him that our work has been focused on developing the medical school program and that the research program is "wide open" for their involvement at the right time. He has agreed to stay on the sidelines until the parties in Urban engage him formally. It will be very important, however, to keep him in the loop after we gain approvals as he is nervous that the engineering and medicine research program will move forward without his hospital system – something that he wants badly to have his hospital engaged as a full partner. I hope this is helpful as we move forward. Sincerely, Paul

Paul O. Umbach
Founder and President
Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313
Cell Number: [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

"Turning ideas into action for 25 years"

From: Rashid Bashir <[\[REDACTED\]](#)>
Sent: Friday, August 15, 2014 9:01 AM
To: [\[REDACTED\]](#)
Subject: letter
Attachments: Letter for President Easter for COM Final.docx

From: Bashir, Rashid
Sent: Thursday, August 14, 2014 10:09 AM
To: Basar, M Tamer; Warnow, Tandy; Zhi-Pei Liang; Rutenbar, Rob; Sanders, William H; Cahill, David G; Ferreira, Placid Mathew; Van Harlingen, Dale J; Nagi, Rakesh; Georgiadis, John G; Wang, Ning; Iyer, Ravishankar K; Hwu, Wen-Mei W; O'Brien, William D; Hsia, K Jimmy; White, Scott R; Sottos, Nancy R; Goldenfeld, Nigel D; Boppart, Stephen Allen; Taher Saif (saf@uiuc.edu); Insana, Michael; Bhargava, Rohit; Leckband, Deborah E; Kenis, Paul J A; Rutenbar, Rob; Goldenfeld, Nigel D; Nahrstedt, Klara; Song, Jun; Ha, Taekjip; Campbell, R H; Cunningham, Brian T; Rogers, John A; Gunter, Carl; Eden, James Gary; Sauer, Peter W; Katzenellenbogen, John A; Gillette, Martha L; Delucia, Evan H; Robinson, Gene E; Steven Sligar (s-sligar@uiuc.edu); Cohen, Neal J; Bryan White; Kramer, Arthur F; Miller, Gay Y; Martinis, Susan A; Destefano, Lizanne
Cc: Johnson, Erin E
Subject: Letter in Support for the Proposed College of Medicine

Dear Colleagues,

As all of you know, our campus is proposing the establishment of a new College of Medicine in partnership with Carle Foundation Hospital. Chancellor Wise is presenting the case for this new college to the BOT health committee on Sept 3rd and to the Board of Trustees on Sept 11th.

A few of us thought of putting a letter together in support of this effort that could help Chancellor Wise while she makes the case. We know that she will have letters from a few nationally prominent individuals in support of her case that have been sent to her and to President Easter.

Our plan would be to send the letter to President Easter (with cc to Chancellor Wise) to transmit to the Board of Trustees.

Please see the attached letter.

We want to know whether we can include your name in the signatories in support of this effort and the letter?

If so, please send us your approval and also your exact title you would like us to use when we include your name. Please send this information to Erin Johnson (siems1@illinois.edu) and myself, and we will collect all the information.

We would appreciate a response before Aug 22nd so we can compile and send shortly after.

Please let us know if you have any questions, advice or comments.

Regards

Rashid Bashir
Steve Boppart
Nigel Goldenfeld
Gene Robinson

+++++++++++++++++++++

Rashid Bashir, Ph.D.
Abel Bliss Professor of Engineering and Head
Department of Bioengineering, 1270 Digital Computer Lab, M/C 278
1304 W. Springfield Ave. Urbana, IL 61801
Co-Director, Center for Nanoscale Science and Technology, www.cnst.illinois.edu
Dept.: 217-333-1867; Fax: 217-265-0246; Cell: 217 722 4250
Department Web Page: <http://bioengineering.illinois.edu/>
Research Group Page: <http://libna.mntl.illinois.edu/>
++++++++++++++++++

Visit <http://engineering.illinois.edu/granger/granger-engineering-breakthroughs-initiative>
Also Visit <http://graingerinitiative.engineering.illinois.edu/frontiersinbioengineering/>
And <http://mnm.embs.org/2014/>

Aug 13th, 2014

Robert Easter, Ph.D.
President, University of Illinois
Urbana, IL

Dear President Easter,

We, the undersigned, unequivocally support the bold and far reaching plans of Chancellor Wise and Provost Adesida for a new Engineering-based College of Medicine on the UIUC campus. We believe that this new college is a compelling opportunity for our campus to continue its proud tradition of breakthroughs in the service of progress, fulfilling its mission as the pre-eminent Land Grant University. Since medicine, our healthcare systems, and global health are some of the next most important progress frontiers for mankind, our unique strength as the vanguard of disruptive innovation through interdisciplinary research and education compels us to take the lead again in defining and pioneering the future for engineering-based medicine. In doing so, our Campus would likely have a profound impact on the University of Illinois, our community, our state, our nation and the world. In the following, we highlight specific reasons that fuel our enthusiasm and galvanize our support for this ambitious undertaking at the present time.

- The last century's breakthroughs in electronics, imaging, materials, and computing, have put the convergence of medicine, biology, and engineering on the fast track to conquering the world's pressing medical and healthcare challenges. Through our internationally-renowned, interdisciplinary research culture and our top-ranked College of Engineering, we enjoy the enviable position of being able to pioneer the technologies and create and teach the knowledge and processes to understand, manage, prevent and cure disease, and to significantly improve our quality of life. With the advances in genomics and low cost sequencing, stem cell engineering, advanced imaging, pervasive and low-cost point-of-care sensors, supercomputing, and other advances – there is no better time to tackle the challenges in health care and medicine through scholarly advances in engineering and technology.
- The democratization of healthcare delivery, both within the U.S. and around the world, and the containment of its rising costs are conflicting challenges. We have faced such a conflict before. Just over sixty years ago, the size of vacuum tube electronics was standing as an insurmountable hurdle to the dream of computing power at our fingertips. Illinois led the world in overcoming this conflict through major contributions to semiconductor electronics and photonics research, computer engineering breakthroughs, and the pioneering of the curricula that educated and inspired the workforce behind today's miracle of information technology. Our world-renowned interdisciplinary culture, built upon the bedrock of the Beckman Institute, the Institute for Genomic Biology, the Micro and Nanotechnology Laboratory, the Coordinated Science Laboratory, the Materials Research Laboratory, and the National Center for Supercomputing Applications positions us for success in this bold endeavor.

- The promise of this frontier of engineering-based healthcare depends on the development of a new paradigm in the education and training of the health care providers of tomorrow. Tomorrow's Physicians must be empowered with the scientific knowledge, engineering expertise and quantitative skills they will need for putting to good use the means and engineering sciences available to them to diagnose, treat, prevent and cure disease. A new medical curriculum is the next educational frontier—the nexus of engineering, medicine, and biology, one we can, and should, be the first to develop and deliver. Our claim to fame as the birthplace of the first microelectronics curriculum and the first computer science and engineering curriculum, demands nothing less of us. To bypass this opportunity is tantamount to saying we will step to the sidelines and let others exploit our engineering expertise and innovations to their advantage. For us, this is not an option. We do not follow trends, we set them.
- Leading with a new medical curriculum will help us to further attract to Illinois the diverse student talent that wants to make a difference in the well-being of others. It will help us and the Carle Foundation Hospital – our committed and capable partner in this new endeavor – to attract the bold and daring physicians and medical researchers, engineering scholars and entrepreneurs who want to ride the wave of change in technology-enabled medicine. Their presence here will expedite the growth of the translational research enterprise, thus nucleating an ecosystem that will complement the vibrancy and strength of Chicago's excellent healthcare and business sector. Moreover, these efforts will drive novel solutions to healthcare, addressing one of the critical problems of the day and help our state towards becoming the "Medical Prairie" of the 21st century.

We have done it before and we can do it again. We are proud to be part of a land grant institution that – faithful to its mission – educates and innovates in the service of progress that touches and influences everyone. We know how to leverage the incredible breadth of our educational fabric to contribute to the new ideas, new opportunities and new technologies that our faculty and our students bring to life.

The time is now to tackle the challenges in health care and medicine with biologically informed engineering and technology, and we are one of the handful of academic institutions in the world that possess the culture, drive, and momentum to lead this new frontier. Our support of the proposed new College of Medicine on the Urbana campus is bolstered by our Campus' can-do attitude and relies upon the power of our autonomy as a campus to pursue those endeavors that will maintain our preeminence in the twin pursuits of labor and learning. Our preeminence hinges on our ability to lead this next frontier of innovation. Engineering-based medicine is our mandate.

With respects

Names –

From: Paul Umbach <PUmbach@trippumbach.com>
Sent: Saturday, August 16, 2014 11:55 AM
To: 'Phyllis Wise'; Normand Paquin [REDACTED]
Subject: RE: Email that I sent this morning to my Tripp Umbach team about how to deal with Carle's shortsighted view of the partnership

Excellent point my friend! YES – doing any agreement between an independent private health system and a public university is painful, difficult and takes YEARS – so don't forget that your work with Carle (in comparison) has gone fast and easy. For example, I am helping Florida State University who after 15 years does not yet have a clinical partnership or a faculty practice plan! FIU and other new schools also have struggled to get the best deal with health systems – thus my advise to "stick with the program" and reel Carle in in the short-term as a break in the relationship at this point would add years putting things back together or fixing a bad deal. Thanks! Paul

Paul O. Umbach
Founder and President
Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313
Cell Number: [REDACTED]
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www.trippumbach.com

"Turning ideas into action for 25 years"

From: Phyllis Wise [mailto:[REDACTED]]
Sent: Saturday, August 16, 2014 12:27 PM
To: Paul Umbach; Normand Paquin [REDACTED]
Subject: Re: Email that I sent this morning to my Tripp Umbach team about how to deal with Carle's shortsighted view of the partnership

Thanks, Paul, for the advice. I just spoke with [REDACTED] who is [REDACTED] hired by the UT system to enable UT-A to have its own medical school. He was very helpful with advice. But one of the things that he said was that they had just (after over three years) come to an agreement with their major clinical partner, Seton. I sure hope it doesn't take us this long!

Phyllis

On Saturday, August 16, 2014 11:06 AM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Hey friends. I am taking you both "under the tent" and letting you see my thinking I shared with my team this morning on the issue of Carle undervaluing the impact that your institution will have on their bottom line each and every year once this school opens. Remember that you both have a "bottom line" that is not reflected in the medical school budgets, but must be kept in mind and on the table as you negotiate your "deal". My email was in response to a question that I believe is important (should tuition revenue be "counted" as a contribution from the University?) as students in the future – as well as faculty and donors will be far less interested in a the Carle no one has every heard of Health System than a nationally know educational brand. The question is

how do you say this politely? The answer is – YOU DON'T -- they don't when they are making their points – so my advise is to bring up the the economic benefit to Carle of association with the University brand and see where it goes. ☺

I hope this is helpful to both of you as you move things forward.

Paul

Paul O. Umbach
Founder and President

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"Turning ideas into action for 25 years"

From: Paul Umbach
Sent: Saturday, August 16, 2014 11:57 AM
To: Beth Paul; 'Ryan, Kenneth J - (kjryan)'; 'pstgermain@cox.net'; Ha Pham
Subject: RE: UT Austin Dean description

Dear Team:

The issue is that Carle is taking a very narrow view of the world and are (purposely?) being blind to the extra downstream revenue. Here are some much bigger questions that needs to be answered: 1) What will it mean to Carle Health System (an organization that I had never heard of until this year after working for 800 hospitals over a 25 year period! Seriously!) to have their name FIRST in the most innovative forward thinking medical school in the US? 2) How much will it be worth for Carle to be mentioned in the same breath with the University of Illinois Urbana Champaign (or is it the other way – still confused on campus branding out there) for the rest of its life? Lets say that the reputation "bump" from Carle having a medical school in association with the University of Illinois U-C provides only 2% more net revenue after expenses annually with no additional service line growth – the system would pocket \$4 million. Let's say that new service lines at the hospital expand as a result of academic medicine (which we estimate at 15% of total community hospital revenue in our AAMC reports), the net annual profit back to Carle as a result of the medical school will be about \$18 million. Add the two "what ifs" and divide by two and you have more than \$10 million annually in likely profit to the health system from the association with a medical school at the University of Illinois.

WOW! Let's find a polite way to communicate this to Carle without pissing them off with the "reputation mismatch" that gets their backs up.

Thanks for asking the hard questions and providing my thoughts as gently as possible.

Paul

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"Turning ideas into action for 25 years"

From: Beth Paul

Sent: Saturday, August 16, 2014 11:25 AM

To: Paul Umbach; 'Ryan, Kenneth J - (kjryan)'; 'pstgermain@cox.net'; Ha Pham

Subject: FW: UT Austin Dean description

Hi, guys, I am forwarding a question from Normand at University of Illinois about allocation of tuition revenue to the University when thinking about partner financial contributions. I don't think Carle Health System is going for this concept at this point, and Normand is wondering if we have any input to help strengthen the argument for the university. Any thoughts?

Hope you all are having a great weekend!

Beth

From: Normand Paquin [mailto:[REDACTED]]

Sent: Saturday, August 16, 2014 9:05 AM

To: Beth Paul

Cc: Paul Umbach; Ha Pham

Subject: Re: UT Austin Dean description

Thank you Beth. My sense is that we are making good progress. Having a smaller group helped yesterday.

I will be looking at revised budget to see where changes have left us today. On a related note, I know the university gets credit for tuition and fees in Greenville. I also know this is the traditional perspective. But my counterparts don't like the latter as an argument. Can you comment on whether UT-Austin is structured this way and name a few more, especially amongst partnerships Carle has looked at via legal team? Is there an example that flies in the face of this?

Thank you for all your help, Normand.

On Aug 15, 2014 10:33 AM, "Beth Paul" <BPAUL@trippumbach.com> wrote:

Hi, Normand, wasn't sure if this will be helpful, but attached is the Dean description used by the recruitment firm for new med school at UT Austin.

Beth Paul

Tripp Umbach

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"Turning ideas into action for 25 years"

From: Paul Umbach <PUmbach@trippumbach.com>
Sent: Saturday, August 16, 2014 11:57 AM
To: [REDACTED] Normand Paquin [REDACTED]
Subject: FW: UT Austin Dean description

FYI -- Input from my senior consultant Ken Ryan...

Paul O. Umbach
Founder and President

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"Turning ideas into action for 25 years"

From: Ryan, Kenneth J - (kjryan) [mailto:kjryan@email.arizona.edu]
Sent: Saturday, August 16, 2014 12:53 PM
To: Paul Umbach; Beth Paul; 'pstgermain@cox.net'; Ha Pham
Subject: RE: UT Austin Dean description

Hey Team,

I did not see an attachment or link in BP's email so will not comment on UT-Austin. **BUT** If Carle is fussing about who gets credit for tuition \$\$ it just adds to the concerns I have raised in emails over the past 2-3 weeks. The point is, tuition comes from the students not Carle. To me, this appears to be just another effort to disguise the fact that Carle is not willing to commit to a significant and ongoing contribution to the operating budget of this medical school. I agree completely with Paul. That Carle can even be mentioned in the same breath with a big and creative program with UIUC is of huge financial value to them. Engineering is one of the top programs at this AAU member university. Compared to the partner models we investigated, CWR/CC Lerner & USC/Greenville, Carle is nothing. The BIG, BIG, thing here is they are on a course toward failure. The LCME will not grant provisional accreditation with the revenue budget (Tables 5 & 6) shown in the financial plan. Carle needs to fill in that gap. Carle's leaders need to demonstrate the vision that this would be a fantastic deal for them in financial terms alone (Paul's point). As I stated earlier, I worry that their board has already capped their commitment.

Ken

Kenneth J. Ryan, M.D.
Emeritus Professor of Pathology & Microbiology
UA College of Medicine
4621 N. Camino Real
Tucson, AZ 85718

From: Paul Umbach [mailto:PUmbach@trippumbach.com]
Sent: Saturday, August 16, 2014 8:57 AM
To: Beth Paul; Ryan, Kenneth J - (kjryan); 'pstgermain@cox.net'; Ha Pham
Subject: RE: UT Austin Dean description

Dear Team:

The issue is that Carle is taking a very narrow view of the world and are (purposely?) being blind to the extra downstream revenue. Here are some much bigger questions that needs to be answered: 1) What will it mean to Carle Health System (an organization that I had never heard of until this year after working for 800 hospitals over a 25 year period! Seriously!) to have their name FIRST in the most innovative forward thinking medical school in the US? 2) How much will it be worth for Carle to be mentioned in the same breath with the University of Illinois Urbana Champaign (or is it the other way – still confused on campus branding out there) for the rest of its life? Lets say that the reputation “bump” from Carle having a medical school in association with the University of Illinois U-C provides only 2% more net revenue after expenses annually with no additional service line growth – the system would pocket \$4 million. Let's say that new service lines at the hospital expand as a result of academic medicine (which we estimate at 15% of total community hospital revenue in our AAMC reports), the net annual profit back to Carle as a result of the medical school will be about \$18 million. Add the two “what ifs” and divide by two and you have more than \$10 million annually in likely profit to the health system from the association with a medical school at the University of Illinois.

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Sent: Saturday, August 16, 2014 11:25 AM
To: Paul Umbach; 'Ryan, Kenneth J - (kjryan)'; 'pstgermain@cox.net'; Ha Pham
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Hope you all are having a great weekend!

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To: Beth Paul
Cc: Paul Umbach; Ha Pham
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Beth Paul

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"Turning ideas into action for 25 years"

From: Phyllis Wise [REDACTED]
Sent: Saturday, August 16, 2014 4:48 PM
To: James.Leonard
Subject: Re: Tomorrow/Update

Jim,

I met with the group yesterday and I think we have things straightened out. But I need to know what your folks tell you after that meeting. We need to meet to be sure that we both feel comfortable with everything.

Welcome back. I hope you had a good break.

Phyllis

Sent from my iPad

> On Aug 16, 2014, at 4:28 PM, James.Leonard <James.Leonard@Carle.com> wrote:

>

>

> Phyllis

> Appreciated the notes and slides- I have not seen any for Carle yet but will review asap when i see them. This note is not copied to the rest of the group because i wanted to keep you up on the feedback I have received - legal folks reported prior to meeting on Friday that MOU intent had been significantly changed. The structure that is in your report is correct but legal view was that there was no true/sustainable shared governance or accountability short of wind down option and that we were effectively in a position of buying branding not partnership (their words). I have not had an update from that meeting yet as to any changes/decisions. I thought we had got some checks and balances that might give the Carle board some comfort but I am quite concerned that the internal rules or interpretations will strangle the project.

> I travel back tomorrow and will f/u as soon as i have summary of the meeting.

> Jim

>

>

> Sent from my iPad

From: Phyllis Wise [REDACTED]
Sent: Saturday, August 16, 2014 5:59 PM
To: James.Leonard
Subject: Re: Tomorrow/Update

Jim,

We are supposed to meet on Aug 20 from 9-10. I would be happy to extend that meeting so that we have more time. Please let me know.

Phyllis

Sent from my iPad

> On Aug 16, 2014, at 4:28 PM, James.Leonard <James.Leonard@Carle.com> wrote:

>
>
> Phyllis

> Appreciated the notes and slides- I have not seen any for Carle yet but will review asap when i see them. This note is not copied to the rest of the group because i wanted to keep you up on the feedback I have received - legal folks reported prior to meeting on Friday that MOU intent had been significantly changed. The structure that is in your report is correct but legal view was that there was no true/sustainable shared governance or accountability short of wind down option and that we were effectively in a position of buying branding not partnership (their words). I have not had an update from that meeting yet as to any changes/decisions. I thought we had got some checks and balances that might give the Carle board some comfort but I am quite concerned that the internal rules or interpretations will strangle the project.

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> Jim
>
>
> Sent from my iPad

From: Phyllis Wise [REDACTED]
Sent: Sunday, August 17, 2014 2:03 PM
To: Normand Paquin
Cc: Adesida Ilesanmi
Subject: Re: Tomorrow/Update

Good on all fronts. I look forward to our meeting tomorrow.

One more thing: since we are dealing with a partnership reporting of the dean to the Provost on our side and the CEO of Carle, I wonder whether we need to put some statement in the document about the CEO of Carle will consult with the Chancellor of UIUC on a strategic directions and vision of the College of Medicine.

Phyllis

Sent from my iPad

On Aug 17, 2014, at 11:42 AM, Normand Paquin <[REDACTED]> wrote:

Phyllis, Ade,

I insert comment within Phyllis' email. I am in Chicago and expect to be back in Champaign around 9:00 PM at the latest.

I'm actually working away. [REDACTED] s at a workshop.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Sun, Aug 17, 2014 at 10:48 AM, Phyllis Wise <[REDACTED]> wrote:
Normand and Ade,

I am forwarding this email to you only! I responded to Jim that I thought that the meetings on Friday went well and that his people felt reassured that we have work out MOU language that conveys that this is a true partnership and not just branding. I also told him that I would be happy to extend the time of our meeting on August 20 beyond the 9-10am time to make sure that we cover all topics that we need to. I have not heard from Jim, but if he accepts, it will mean that I won't be at the COD meeting. Ade this is an important meeting for many reasons, so I am sorry that I might be late or not there at all.

A few more points that are important.

1. Normand, I think it may be important for you to attend the August 20 meeting to help with the budget presentation to Jim, if I don't think I can handle it after our meeting tomorrow. But it is also important for you to leave right after that so that I can have. 1:1 conversation with Jim to reassure him that Carle is an equal partner.

That is my understanding. I will have slides for our discussion tomorrow. We can decide if this is a good framework for discussion.

2. Normand, The budget allocations of revenues and our calculations of other revenues may be a hard pill for him/them to swallow, no matter what Paul and his colleagues say. When will you be discussing this with the whole finance working group?

I have been weary of discussing this with the Carle financial leads. If Steph and Joe were in town, I could meet with them but they will be out until Thursday. Let's discuss on Monday. I can see a scenario where Vicky and I meet with the Carle CFO and his key report ahead of your meeting with Jim. But I see August 20 as an opportunity to equip Jim with arguments he can use to convince his board and his key financial staff. The final budget corrected some errors and was not cut quite as much. So the financial investment needs are higher.

3. Normand, do you know what time the Carle special board meeting is going to be? If Jim wants me to attend, I need to figure out what other meetings I need to move around.

I do not. I suspect the evening because this is a special one. I have asked Joe and Steph.

4. Ade, I know you are meeting with Normand on August 19. I will be driving to Chicago with Dan and so cannot be there. If I need to be on the phone while you meet, I need to know when you are meeting. I have meetings in Chicago from 11-1 and 1:30-2:30. Times before and after that I will be on the road.

We picked the meeting time for you to be able to listen in while driving. It is from 9:30 to 10:30 AM. Molly and Mike Delorenzo will be there as well.

5. Normand, you suggested that having the oversight committee report to the CEO of Carle and the Provost instead of to the dean would help to allay their feelings of not being able to have input at the highest level. I think this is a good idea. You should propose it and I will discuss it with Jim.

Glad you are open to the idea. I preemptively have ask our legal folks whether we can make this work within our statutes. I reread the Greenville agreement and I am even more convinced we should make this work with a similar functionality. I will forward you email I sent our legal folks. I hope to discuss with you tomorrow as well. I actually think this will be the key to getting the Carle Board to agree. If I can propose this before LJ (legal counsel) meets with Jim, it could really make the difference as to whether things go well when you meet Jim. I think he will need this to get his board on board.

6. Normand, you said that it might be difficult for Carle to have input in the selection of the dean because of our statutes. This would be a show stopper. I think we need to get Jim an appointment on our campus (he may already have one at UIC). We need to make sure that anyone who serves on the search committee from Carle has an appointment in some college on our campus. Having them on the search committee is an absolute must if this partnership is going to succeed!

Seeing how this can be done is an action item that we have given to our legal team. One option might be to recognize that the provost assigns his search committee for the Dean position while the CEO of Carle needs to have a committee to evaluate whether this same person can become his Chief Academic Officer. The Provost and Carle CEO could then concur that the separate search committees should logically be merged as one.

7. I spoke with [REDACTED] on Friday. He's the [REDACTED] who was hired in 2003 by the UT system to help with the health sciences and has driven the establishment of the UT Austin College of Medicine. He told me that they had just received their first \$35m from the health district. But more importantly, he told me that they just signed their agreement with their primary clinical partner, Seton, after many years of negotiations. So our partnership with Carle has been at warp speed compared to them.

Sorry for the long email.
Phyllis

Sent from my iPad

Begin forwarded message:

From: James.Leonard <James.Leonard@Carle.com>
Date: August 16, 2014 at 4:28:11 PM CDT
To: Phyllis Wise <Phyllis.Wise@Carle.com>
Subject: Tomorrow/Update

Phyllis

Appreciated the notes and slides- I have not seen any for Carle yet but will review asap when i see them. This note is not copied to the rest of the group because i wanted to keep you up on the feedback I have received - legal folks reported prior to meeting on Friday that MOU intent had been significantly changed. The structure that is in your report is correct but legal view was that there was no true/sustainable shared governance or accountability short of wind down option and that we were effectively in a position of buying branding not partnership (their words). I have not had an update from that meeting yet as to any changes/decisions. I thought we had got some checks and balances that might give the Carle board some comfort but I am quite concerned that the internal rules or interpretations will strangle the project.

I travel back tomorrow and will f/u as soon as i have summary of the meeting.
Jim

Sent from my iPad

From: Normand Paquin [REDACTED]
Sent: Sunday, August 17, 2014 3:07 PM
To: Phyllis Wise
Subject: Re: People

Greg is external legal counsel who works for us.

I think the woman you are referring to is Kerrin Slattery. She was the senior representative from the external legal counsel firm (MWE from Chicago) retained by Carle who was there in person. She had another colleague, Guy Collier, on the call as well as LJ Fallon, lead counsel for Carle. MWE have really moved things along for the Carle side.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: + [REDACTED]

On Sun, Aug 17, 2014 at 2:55 PM, Phyllis Wise [REDACTED] wrote:
Normand,

Who odes Greg Pemberton work for, us or Carle? Wh was the woman who did most of the talking at the end of my side of the table when we met on Friday?

Phyllis

Sent from my iPad

From: Phyllis Wis [REDACTED]
Sent: Wednesday, August 20, 2014 6:40 AM
To: Normand Paquin
Subject: Re: At least question

Yes, I would take out the at least.

Sent from my iPad

On Aug 20, 2014, at 6:26 AM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

My schedule is tight ahead of our 9:00 AM meeting so I thought it best to communicate this way.

Slide 5 begins with the following:

[REDACTED]
I am concerned about the " [REDACTED]"

Your thoughts?

I will have both versions on hand but will monitor for your response.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

<DRAFT – For discussion purposes only budget and MOU V4.pptx>

From: Normand Paquin [REDACTED]
Sent: Monday, August 25, 2014 7:25 PM
To: Phyllis Wise
Subject: Thoughts

Phyllis,

As I indicated, I gave Paul a call to get his perspective on this notion of "us taking this College and simply running away with it."

Paul agreed with me that there is the basic premise that we need their clinicians, their internships, their space. It is not as though we can go down the street and partner with someone else. So you would think we could argue there is a need for us to listen to them. BUT you and I heard Jim talk about the perceived [REDACTED]

[REDACTED] So I suspect this argument is not going to carry much water.

But then we got into a discussion that I think is important to think about that reflects the different cultures and worlds of our respective institutions.

It started with me talking about how we must have the ability to allow a dean to pursue a goal even up to the BOT as unlikely as this is. Paul noted that is not the issue. What Paul said is that in academia, the dean can go to the Provost and when the Provost says, "No, I can't fund this," the dean has the option of simply fundraising to get the money and then do what he wants. In academia, we applaud this and love the initiative and drive this represents..

In the Health world, if a bunch of physicians want a new visualization center, they don't get to go off and fundraise for their goal - the administrators dictate the priorities and would not be amused if the physicians went off on their own. They have control.

Paul added that one of the things that goes wrong with academic health centers is that they become donor-driven as they chase gifts and endowments. They start doing anything and everything as long as someone has paid for it. From Carle's perspective, this is potentially a horrible scenario where the college starts running off in different directions that doesn't fit the original vision and mission of the College and stops being focused on items Carle seems as vital. I guess you could see this as "running away with it." Stephanie even brought this up at the Ed Pol Committee meeting today. She talked about all those health colleges crumbling under the weigh of offering dozens and dozens of different residencies and diluting resources to address any and all diseases they can get funding for. So focus is definitely an issue for them.

I noted that our MOU draft states that [REDACTED]

[REDACTED] Paul suggests stating that the Joint Liaison Committee be the body that would make the decision as to whether such an expenditure/investment was aligned with the vision and objectives of the COM would be helpful. It would provide a forum for discussion to develop understanding and a means to keep the college focused.

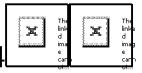
Paul thinks acknowledging the different perspective can get us a long way towards a solution based on trust and understanding.

Hope this helps, Normand

Dr. Normand Paquin

Skype: normand_paquin

Tel: +1-217-819-8964



From: Phyllis Wise [REDACTED]
Sent: Wednesday, August 27, 2014 4:52 PM
To: James.Leonard
Subject: Re: Couple of things

Dear Jim,

First, thanks for your note of support. You and I often times have tough decisions to make. But I honestly have never experienced this much loud blow back from a minority. I value your opinion so much, so thanks.

Second, I am so pleased/relieved to hear that your board meeting went well. Our histories/cultures/rules may be different, but I remain convinced that this is a game changer for both of us. I think we saw that well before your board or my academic senate or Board of Trustees appreciated it. So pulling/pushing/leading/managing at the right pace is key.

Thanks so much for your incredible leadership.

Best wishes,
Phyllis

Sent from my iPad

On Aug 27, 2014, at 9:52 AM, James.Leonard <James.Leonard@Carle.com> wrote:

Phyllis,
Just wanted you to know that I appreciate all you have done for the University and the Community. I support you and think you are exactly the right person for the job.
Second- last night our Board Education/Meeting went well. All of the effort, discussions and negotiations between our two enterprises paid dividends because their questions hit on every difficult topic, fear and rumor that we have spent the summer working on. The end result is that they (without a formal vote) remain committed to the vision of a separate medical school here and appreciate that we are both working on not just governance and finance but also history and culture. Our pace with them seems about right as we nail down the "must haves" for their fiduciary and governance concerns as we create a partnership around the COM.

Jim

James C. Leonard, MD
President & Chief Executive Officer

<image002.png>We will be a world class innovator providing exceptional patient care and research

To: Phyllis Wise
From: Normand Paquin
Subject: Answer on anticipation accounts from foundation
Sent: Wed Aug 27 21:23:20 2014
Importance: Normal

Phyllis,

Did Dan ever get back to you about possible anticipation accounts for fundraising or for covering shortfalls while Carle pays steady amount? Carle knows we built AHS building extension ahead of [REDACTED] money coming in. They are wondering why we are telling them we can't do this for them. Jennifer Earley shared this with Paul and I this evening.

Normand

From: Peterson, Dan C <dcpeters@illinois.edu>
Sent: Thursday, August 28, 2014 7:32 AM
To: Phyllis M Wise
Subject: Re: Answer on anticipation accounts from foundation

Phyllis,

I did talk with Christy Devocelle at UIF about this. She said it is actually UA that we need to seek gap funding from. This is because all of the expendable funds that are generated from endowments are transferred monthly to university accounts in the Banner system. This is different practice from what we did at OSUF.

Dan

On Aug 27, 2014, at 9:56 PM, "Phyllis M Wise" [REDACTED] wrote:

Would you like to respond to Normand

Sent from my iPhone

Begin forwarded message:

From: Normand Paquin <[REDACTED]>
Date: August 27, 2014 at 8:23:20 PM MDT
To: Phyllis Wise [REDACTED]
Subject: Answer on anticipation accounts from foundation

Phyllis,

Did Dan ever get back to you about possible anticipation accounts for fundraising or for covering shortfalls while Carle pays steady amount? Carle knows we built AHS building extension ahead of [REDACTED] money coming in. They are wondering why we are telling them we can't do this for them. Jennifer Earley shared this with Paul and I this evening.

Normand

To: [REDACTED]
From: [REDACTED]
Subject: Support
Sent: Thu Aug 28 08:25:56 2014
Importance: Normal

Phyllis--

I got your contact info from Greg Lykins so I could send this. Incidentally, having Greg as a friend will serve you well. We have been close friends since 1970 and our relationship is a blessing in my life. I was hoping your and my paths would cross sometime after we spoke briefly after the Carle board meeting but since that has not happened I decided to send this note.

I continue to be supportive of the attempt to create a new college of medicine at UIUC and have encouraged and supported the work being done by Jim Leonard, Stephanie Beever and others from Carle who have been part of the team working with university staff. My sense of this is that it is a "heavy lift" but what isn't that is challenging and new. A COM venture between Carle and the university could be a "game changer" for both. Few opportunities like this come along in ones time in leadership and your seizing the moment is a real credit to you as a strategic thinker.

On another note, I applaud your decision with respect to Salaita. We need to be proud of the conduct of our faculty and it would be very difficult to be proud of a person who is intemperate and disrespectful. I recognize universities are different organizations but it only seems reasonable to me that the CEO (you) has the ultimate power to foreclose a faculty appointment. That might only happen one in a thousand or more times, but it should be a power that exists. You used it courageously and thoughtfully and I believe it reflects the values of the greater community and Illinois alums. In the end, we expect our leaders to do the right thing and you have done so.

Continued best wishes in your most challenging position. I'm sure your schedule is unbelievably difficult to manage, but I'd enjoy the chance to spend a few minutes with you over coffee sometime and get to know you better. If I can ever do anything to assist you in my small sphere, don't hesitate to call upon me. Other than my ongoing service on the boards of [REDACTED] and [REDACTED] I'm retired so time is my most valuable resource.

[REDACTED]
Sent from my iPad

From: Jtolliver <[REDACTED]>
Sent: Sunday, August 31, 2014 12:07 AM
To: Phyllis Wise
Subject: Re: Don Chambers

Sorry, I should have said Wednesday's meeting, not Tuesday's. Know that we will be cheering for you!

Joyce Tolliver

On Aug 31, 2014, at 0:04, Jtolliver <[REDACTED]> wrote:

Phyllis, thanks, I just read the cover letter and started reading through the report but had to take a break: It is beyond comprehension what standing they think they have to present an "alternative" to our proposal for an academic program on our campus.

I am not sure what to think of Don's comment to JW. I do know that there is an established procedure for dealing with academic proposals from the campuses in USC, and it does not involve debating the merits of alternative proposals.

I am planning to watch the live video of Tuesday's meeting if I'm not able to get to NCSA in time. Fingers crossed.

Joyce

Joyce Tolliver

On Aug 30, 2014, at 22:08, Phyllis Wise <[REDACTED]> wrote:

Dear Joyce,

I heard from Jennifer Woodard, who spoke with Don Chambers recently. He told her that he agrees with me on the Saleita issue but he is going to "have to do battle with Phyllis on the COM issue". He considers the Manatt report as the final word on what we should do. Do you have a copy of this report, which comes from their consultant? I would be happy to send it to you if you do not have it. Dimitri sent it out to all faculty students and staff in a mass mail and Dean Mariscalco sent it to all the faculty, staff and students on our campus. I will forward you that email.

Phyllis

From: Nick Burbules [REDACTED]
Sent: Sunday, August 31, 2014 5:01 PM
To: Ilesanmi Adesida
Cc: Phyllis Wise; Joyce Tolliver
Subject: Re: Don Chambers

I think you put it well, Ade - we need to argue that these AREN'T threats (though I expect UIC to press that they are).

On Sun, Aug 31, 2014 at 4:33 PM, Ilesanmi Adesida [REDACTED] wrote:
The wording of the 4th item on the USC resolution may present an issue for us

"..... collaborative solutions when one proposed campus initiative is thought to present potential impediments to the pursuit of excellence on the part of any of the other campuses".

The critical issues which UIC seems to be harping on are that the medical space is theirs only and allowing us to have a medical school will present potential impediments to their pursuit of excellence; the other issue is that we will take money from the State which should go to their Medical School. Of course to both items, we can make cogent arguments. We have to be ready to make them assertively!

Ade

On Sun, Aug 31, 2014 at 12:37 AM, Nick Burbules [REDACTED] wrote:
Thanks Phyllis,

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And the USC's latest resolution on this (which he supported) says quite clearly that one campus shouldn't be able to veto what another campus wants to do:

Fourth, that the Conference does not believe that it is within the jurisdiction of the faculty or administration of any one campus to curtail the academic planning of any other campus. Rather, the Conference urges administrative and faculty leaders across the campuses to pursue constructive, collaborative solutions when one proposed campus initiative is thought to present potential impediments to the pursuit of excellence on the part of any of the other campuses.

On Sat, Aug 30, 2014 at 10:08 PM, Phyllis Wise [REDACTED] wrote:
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Phyllis

From: Joyce Tolliver [REDACTED]
Sent: Sunday, August 31, 2014 5:18 PM
To: Ilesanmi Adesida
Cc: Nick Burbules; Phyllis Wise
Subject: Re: Don Chambers

I appreciate the good close reading of the USC statement, Ade.

But I think those "collaborative solutions" have already been taken into account in our proposal. And, importantly, it is up to the proposer of the initiative to take into account the well-being of the other campuses and to align the proposal appropriately--something that has already been done and that in fact is reflected in the T-U feasibility study.

I think you have put your finger on an important logical flaw in the UIC response: they want it both ways. On the one hand, they want to claim that the College of Medicine is a university-wide entity; and on the other hand they want to assert control over it as if it were, as you say, "theirs only."

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Phyllis

--
Joyce Tolliver

From: Nick Burbules [REDACTED]
Sent: Sunday, August 31, 2014 8:48 PM
To: Ilesanmi Adesida
Cc: Joyce Tolliver; Phyllis Wise
Subject: Re: Don Chambers

Hello all,

This is worth a longer discussion, but in this context "unit autonomy" means - we get to hire who we want, and no one can overrule us.

The problem is, as we've seen here, that 5 faculty can make a bad decision that make 2000 faculty suffer.

Nick

On Sun, Aug 31, 2014 at 6:34 PM, Ilesanmi Adesida [REDACTED] wrote:

Yes indeed. I am not sure that they understand what VONC stands for. I have told some Deans and will tell the others that VONC has dire implications!

One thing that I am wondering about is this thing that people are so concerned about called "Unit Autonomy". What does it exactly mean in our statutes? Does it mean that any unit can well do anything they choose to do without any oversight? Does a unit with 6 tenure track faculty have that autonomy? What is the magnitude? I know that California and Rhode Island have the same votes in the Senate but we do know that California carries more weight in many other relevant spheres! When is a unit autonomy subservient to the authority of the BoT in our system? This may require a thesis to define this accurately.

On Sun, Aug 31, 2014 at 6:25 PM, Nick Burbules [REDACTED] wrote:

Another thing. I was talking with a colleague who knows something about the Phil Dept. and he said, "They don't know what a "Vote of No Confidence" is. They are angry and they want to vote that they disagree with the chancellor and want her to change her mind. They think that a "VONC" is the way to do that." (Or they are being TOLD that.)

They don't realize (all of them) that a VONC is a very specific vote tantamount to calling for someone's resignation - and that may not be what they intend. If they want to vote "I'm angry and I disagree with the chancellor and I want her to change her mind." they should vote THAT.

I wonder Ade if something should be said to the deans, and through them the dept heads, that their faculty ought to realize what a VONC means before they take these votes. Whatever units choose to vote, they ought to realize what they are committing to.

On Sun, Aug 31, 2014 at 6:18 PM, Nick Burbule [REDACTED] wrote:

I agree with all of this. And a related issue is that one of our stars here once said, "I am all for collaboration. But when I collaborate, my cutting edge peers are at Stanford, MIT etc. They aren't in Chicago. There's no benefit to me in being forced to collaborate with UIC."

I don't know if or how it's possible to say this. But somehow we need to communicate that you can say there's "Bioengineering at Urbana, and there's Bioengineering at UIC" - but they aren't playing the same game, at the same level. Just because the depts have the same name doesn't mean they fit. Our engineers reinvent the world. That's what we want to do here.

On Sun, Aug 31, 2014 at 6:08 PM, Ilesanmi Adesida [REDACTED] wrote:

The sort of COM that we want will not thrive under a COM that is benemoth! Being big is great if that is what you want. Being the best and being innovative are our hallmark! We will not attract the sort or level of people that we want and need to distinguish us from others! Our aim is to look for National Academy Members (with excellent collaborative reputation) to come here for this new initiative and we have some identified already. We have had tremendous responses from leaders in biomedicine around the country who have given their support and mentioned that we are uniquely positioned to do this NewCOM. Nobody in their elements will come here to be a Regional Dean being dictated to from Chicago. It is a road to nowhere, and worse, to mediocrity!

On Sun, Aug 31, 2014 at 5:27 PM, Nick Burbule [REDACTED] wrote:

On Sun, Aug 31, 2014 at 5:18 PM, Joyce Tolliver [REDACTED] wrote:

I think you have put your finger on an important logical flaw in the UIC response: **they want it both ways**. On the one hand, they want to claim that the College of Medicine is a university-wide entity; and on the other hand they want to assert control over it as if it were, as you say, "theirs only."

Brilliant Joyce, So, if it is "one university," then Urbana and Springfield and Peoria and Rockford should have a vote in deciding who the dean of the COM is - maybe even someone from one of those locations.

Either the COM belongs to Chicago, or it belongs to EVERYONE.

On Sun, Aug 31, 2014 at 4:33 PM, Ilesanmi Adesida [REDACTED] wrote:

The wording of the 4th item on the USC resolution may present an issue for us

"..... collaborative solutions when one proposed campus initiative is thought to present potential

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The critical issues which UIC seems to be harping on are that the medical space is theirs only and allowing us to have a medical school will present potential impediments to their pursuit of excellence; the other issue is that we will take money from the State which should go to their Medical School. Of course to both items, we can make cogent arguments. We have to be ready to make them assertively!

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Phyllis

--
Joyce Tolliver

From: Nick Burbules [REDACTED]
Sent: Sunday, August 31, 2014 9:40 PM
To: Phyllis Wise
Cc: Joyce Tolliver; Ilesanmi Adesida
Subject: Re: Don Chambers

I hear that UIS wants to start a small nursing program - and I guess it will be UIC too.

On Sun, Aug 31, 2014 at 9:28 PM, Phyllis Wise [REDACTED] > wrote:
There's real inconsistency throughout the report. Sometimes they call this the UI COM and other times the UIC COM. We will be at the ribbon cutting for the new space of the College of Nursing in Urbana. They have large banners outside the building calling themselves the UIC College of Nursing.

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Phyllis

Joyce Tolliver

From: Ilesanmi Adesida [REDACTED]
Sent: Monday, September 01, 2014 1:33 AM
To: Phyllis Wise
Cc: Nick Burbules; Joyce Tolliver
Subject: Re: Don Chambers

In the main, they call it UIC-COM. In their communications with me, it is UIC-COM. When it is convenient, especially for the BoT, they call it UI-COM. Well, we know it is UIC-COM because they banned the folks here never to use column I logo on anything -- not on their presentations and not on their badges. In the report, they could not make up their mind! Let's say it is bat -- neither a mouse nor a bird!

On Sun, Aug 31, 2014 at 9:28 PM, Phyllis Wise [REDACTED] > wrote:
There's real inconsistency throughout the report. Sometimes they call this the UI COM and other times the UIC COM. We will be at the ribbon cutting for the new space of the College of Nursing in Urbana. They have large banners outside the building calling themselves the UIC College of Nursing.

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Phyllis

--
Joyce Tolliver

From: Normand Paquin [REDACTED]
Sent: Tuesday, September 02, 2014 6:21 AM
To: Phyllis Wise
Subject: Re: Talked to Stephanie

Fantastic. What we are proposing is simply what is best for the university and the state.

On Sep 1, 2014 8:48 PM, "Phyllis Wise" [REDACTED] > wrote:
Normand,

I talked with Jim just now and we are totally on one page. I told him that I thought that the Manatt paper was a propaganda piece, a whitewash and he said that those were the nicest way to characterize it. I told him that it would be important for him to say that the partnership with us was critical and not replaceable by a partnership with UIC, and that if this did not work he had other areas he would invest in and it wasn't UIC. He is in total agreement.

Phyllis

On Monday, September 1, 2014 3:09 PM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

Stehanie will aim to catch Jim first thing in the morning so she can convey to us when we meet later that morning what Jim might be willing to say. She thought that Jim would be willing to say how important in his view it was for a successful college of medicine to have close connectivity between education, research, clinical and community service missions and as such how important he viewed considered the ability to have decision-making here in Urbana-Champaign. Along similar lines, she will confirm with him as to his willingness to indicate that Carle feels so strongly about this that any significant investment in a new College of Medicine is predicated on such a local partnership and decision-making authority.

I did not go negative in my conversation with her. i.e. the history of working with a dean 150 miles away.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

From: Phyllis Wise [REDACTED]
Sent: Thursday, September 04, 2014 2:16 PM
To: Phyllis Wise
Subject: Fw: Civility, Respect and the Carle Behavior Standards

On Thursday, September 4, 2014 12:16 PM, James. Leonard <James.Leonard@Carle.com> wrote:

This was sent out and is posted on our internal newsletter today.
Jim

James C. Leonard, MD
President & Chief Executive Officer

We will be a world class innovator providing exceptional patient care and research

From: Ann.Beyers **On Behalf Of** James.Leonard
Sent: Thursday, September 04, 2014 11:54 AM
To: ALLCARLE; ALLDOCS
Cc: Gayle Huber
Subject: Civility, Respect and the Carle Behavior Standards

"Don't discount the power of your words. The thought that they might cause unnecessary hurt or discomfort should inform every conversation." -- Dr. P.M. Forni, Director of The Civility Initiative at Johns Hopkins.

I thought it was appropriate to share the words of Dr. Forni in light of the ongoing headlines about controversies at our own prestigious university. I recently joined a number of local community and business leaders in signing an open letter expressing support of Chancellor Wise's leadership and track record of advocating for human rights, diversity, and inclusion. It also made me reflect on Carle's longstanding commitment to be an environment of accountability, trust and respect.

We have spent the past year focusing on Standards of Behavior, and this summer we initiated a process for behavioral assessments (HSL/SL) as part of improving the Carle Experience for our patients and ourselves. Why did we do that?

We did it to create a better environment so all of you can be more personally and professionally successful. It is with ongoing constructive feedback that we can learn and grow as individuals and develop as colleagues. As a leader, I seek to create and sustain an environment at Carle and Health Alliance that is respectful and team oriented. We don't always agree with each other. In fact, sharing differing opinions is healthy and encouraged. Doing so challenges all of us to be our best. From

Rounding to Safe Stop we have programs in place that encourage healthy dialogue and that challenge all of us to make sure we are always doing what's right for the patient, our customers and each other. We also have mechanisms in place and policies that support individuals to share with their leadership team and/or Human Resources any concerns they may have about their work environment. It is with this information that any necessary interventions can be made for respectful resolutions.

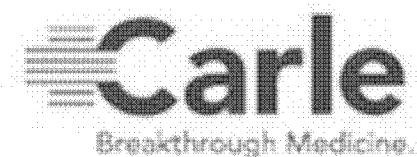
What's not okay is to get angry, yell, or to be disrespectful. It's not ok to demean or intimidate others. Doing so shows a lack of judgment and a lack of respect. That type of discourse is not meant to solve a problem—it's reactive, reckless, and demonstrates a blatant disregard for proper interactions, particularly if those occur in the workplace. It is when we have the healthy, tactful, and professional dialogues with one another that we will continue to excel as an organization.

Dr. Forni frequently talks about the rewards of fostering a culture of civility in today's workplace. He says: "Civility means a great deal more than just being nice to one another. It is complex and encompasses learning how to connect successfully and live well with others, developing thoughtfulness, and fostering effective self-expression and communication. Civility includes courtesy, politeness, mutual respect, fairness, good manners, as well as a matter of good health. Taking an active interest in the well-being of our community and concern for the health of our society is also involved in civility."

As a health care leader, I am proud of the steps the Carle enterprise has taken over the years to promote civility and inclusive work environments. Further, our efforts under The Carle Experience continue to illustrate the commitment each of you has personally made and for that I am appreciative. I often receive thank you notes from our patients and customers, not necessarily touting innovative or cutting edge technologies, but rather they are almost always thanking me for the people who work for our organization and the exceptional compassion and service they give to our patients, families, customers, and communities. This type of recognition is possible because of our ongoing commitment to mutual respect and teamwork, in a professional and positive work environment. Thank you for your willingness to engage and be part of a very special culture here at Carle, one based on respect and civility.

I encourage you to continue to find ways to live the Behavior Standards in your interactions with one another and think about how they apply to your workplace and what you can do to advance a culture of accountability, respect and civility. In the end, we will have a healthier workplace, a healthier community and a healthier you.

James C. Leonard, MD
President & Chief Executive Officer



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From: Greene, Donna <Donna.Greene@busey.com>
Sent: Thursday, September 04, 2014 3:39 PM
To: Ilesanmi Adesida
Subject: Re: Beautiful!

Ade,

It was a wonderful evening and it is always great to see you. I love your positive attitude, your ever present smile, your humility and your humor! Also should add the fact that you are very smart!!

I know there is a lot on your mind right now, but the evening seemed to add a little magic that was sorely needed!

Thanks again,
Donna

Sent from my iPad

On Sep 4, 2014, at 3:34 PM, "Ilesanmi Adesida" <[REDACTED]> wrote:

Thanks, Donna. What a beautiful picture! May the sun radiate this much good into our lives. Great seeing you yesterday at the College of Medicine hearing. I am counting that we will be successful in this effort; that will mean a great deal to this community over the long term. Again, thanks. Ade

On Tue, Sep 2, 2014 at 7:20 PM, Greene, Donna <Donna.Greene@busey.com> wrote:

The information contained in this e-mail is privileged and confidential. Unless otherwise indicated or obvious from the message, this is intended only for the individual(s) listed above. Please see our Privacy Notices at <http://www.busey.com>.

The information contained in this e-mail is privileged and confidential. Unless otherwise indicated or obvious from the message, this is intended only for the individual(s) listed above. Please see our Privacy Notices at <http://www.busey.com>.

To: Phyllis Wise
From: Joyce Tolliver
Subject: Re: today
Sent: Thu Sep 04 21:50:37 2014
Importance: Normal

Phyllis, I am attaching the statement in case the students have not posted it on the ISS website.

best wishes
Joyce

On Thu, Sep 4, 2014 at 5:14 PM, Phyllis Wise [REDACTED] >>
wrote:

Joyce,

I actually have not seen the statement. I will look for it on their website.

Thanks for your continuing and unwavering support!
Phyllis

On Thursday, September 4, 2014 2:59 PM, Joyce Tolliver [REDACTED]
<mailto:[REDACTED]>> wrote:

Phyllis, last night as I was relaxing into an evening at home with some good books and a simple dinner, I thought of you and hoped that you were able to do the same, finally, after your triumph yesterday.

Of course I should have known that you would instead be with the students, talking but mostly listening, once again putting into action the notions of tolerance and dialogue that you have worked so hard to imprint into our campus culture.

I've just read the statement that the study body president wrote and shared at last night's meeting. It is a source of inspiration and hope, and I also take it as a tribute to you and your work here.

Joyce

On Wed, Sep 3, 2014 at 10:27 PM, Phyllis Wise [REDACTED]
<mailto:[REDACTED]>> wrote:

Dear dear Joyce,

You are really so kind to write. I agree that Jim and I made a great team today and looked good in part because Dimitri looked so bad. We got what we needed today: tacit approval to go ahead with the business plan and the governance plan, even if they did not want to use the term "endorse". We'll have to finalize the finance plan and the MOU in time for the November meeting.

Apparently Julie Worth asked Jim and he said he had permission from his board to contribute \$100M and that he was unwilling to put that toward the UIC COM.. I wonder whether that will be headline tomorrow.

I spent the evening at the Student Senate meeting and their were students both for and against Saleita. I really hope that either the BOT will vote or we get some kind of settlement so that we can put that behind us. It is such a polarizing issue.

Thank you for all the work that you have put into the COM MOU. It will be more airtight because of all your efforts.

Best,
Phyllis.

On Wednesday, September 3, 2014 5:45 PM, Joyce Tolliver <[mailto:\[REDACTED\]](#)> wrote:

Phyllis, you made us look SO good today! You projected confidence, energy, clarity, and vision. I was impressed and happy to see that you directly addressed a couple of the UIC "counter-proposal" points, and very convincingly.

Not that I'm biased or anything, but I thought you and Dr. Lennard presented an air-tight case. In fact, the weird committee befuddlement about process was probably because telling you not to go ahead was not even on their radar, after that presentation.

We are so very lucky to have you as our leader.

Joyce

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Joyce Tolliver

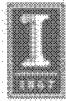
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Joyce Tolliver

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Joyce Tolliver

UNIVERSITY OF ILLINOIS
AT URBANA-CHAMPAIGN

Illinois Student Senate
250 Illini Union, MC-334
1401 West Green Street
Urbana, IL 61801



Peers and Colleagues,

Over the past month, my colleagues, friends, students, and I, have watched the debate and the following polarization engulf our campus and the media around the decision our administration made over the hiring process of Steven Salaita. I have watched my friends and peers split on the issue and make respectable arguments for and against the decision. But as the Student Body President at the University of Illinois at Urbana-Champaign and as a representative of the “Official Voice of the Student Body,” it is my duty and charge to advocate for the entirety of the Student Body. This means making our campus the best it can possibly be for my peers in the present and my peers in the future—as new Illini join our ranks.

The decision has deeply and rightfully angered members of our campus, especially my peers in the American Indian Studies Program who were left with no recourse. Those members of our community have every right to be upset, as a potential faculty member and his family had shared meals with them, were invited into their homes, and were welcomed to Illinois as we welcome everyone who steps foot on our campus. So of course when this decision was made under the circumstances that is was, our friends, peers, and colleagues became irate. It was unprecedented, surprising, and distressing.

In talking with a multitude of my fellow students about this, I heard complaints that they did not feel welcome at Illinois, and that their opinions on a controversial conflict had been marginalized and neglected. As a campus devoted to the principles of inclusivity, we must make it our top priority to make sure every student on our campus feels welcome, respected, and safe to engage in discourse. In the same note, as a campus, committed to the ideals of inclusivity and bound by the principles of shared governance, we must realize and respect the decision that Chancellor Wise has made as being from the same grounds of inclusivity.

At the absolute foundation of this University and campus community is the core principle of inclusivity. In my position as the Student Body President, but more importantly as a student and member of this campus community, I have joined thousands of my fellow students, faculty, staff, and administrators in committing to these five statements outlined in our Inclusive Illinois initiative:

- I will encourage the expression of different voices, perspectives, and ideas.
- I will challenge my own beliefs, opinions, and viewpoints.
- I will advocate for an accessible, safe, and respectful environment to enhance the living, learning, and working community at Illinois
- I will acknowledge and respect the multiple identities represented in each individual.
- I will demonstrate my commitment through my voice and my conduct.

These statements and the sheer amount of time, energy, and resources, our campus has put into developing a welcoming and inclusive community is a simple testament to the seriousness and amount of respect we give this fundamental principle.

In addressing the polarity on our campus in this present time, I think it most critical to reflect upon these statements. If a professor plainly states intolerance towards others, can we really say he will ‘acknowledge and respect the multiple identities represented in each individual’? When a professor allegedly announces that he wishes almost certain death to civilians who live in a disputed land, can we really say that same professor can create an ‘accessible, safe, and respectful environment to enhance the living, learning, and working community at Illinois’? In our day and age with digital communication, we must always be cognizant of our perception despite the intentions of a mere 140 characters.

At stake here is not the academic freedom and right to free speech of any individual, Chancellor Wise has already stated and recommitted to those fundamental principles of our education system. What is at stake is the integrity of our University, what is at stake is the community of our campus. When tension and anger are allowed to flourish and thrive, our campus becomes unstable, our relationships begin to polarize, and our inclusive community becomes the exact thing we were against in the first place.

So while I continue to encourage this discussion of differing opinions, and while I will continue to challenge my own beliefs, opinions, and viewpoints, I will also advocate creating an accessible, safe, and respectful environment to enhance the living, learning, and working community at Illinois. I will acknowledge and respect the multiple identities represented in each individual, as I continue to demonstrate my commitment to these principles through my voice and my conduct, as I have done in this letter and I will in all future endeavors. I do this because I believe in an inclusive Illinois, and I believe in a welcoming Illinois, and because I believe in this place I call home.

Sincerely,

Mitch Dickey
Student Body President
University of Illinois at Urbana-Champaign

To: Phyllis Wise
From: Joyce Tolliver
Subject: Re: today
Sent: Fri Sep 05 07:07:12 2014
Importance: Normal

Glad to help.

On Fri, Sep 5, 2014 at 5:21 AM, Phyllis Wise <[REDACTED]<mailto:[REDACTED]>> wrote:

Joyce,

Thanks for saving me the time! What lovely service, on top of all the support, you give me.

Best,
Phyllis

On Thursday, September 4, 2014 9:51 PM, Joyce Tolliver <[REDACTED]<mailto:[REDACTED]>> wrote:

Phyllis, I am attaching the statement in case the students have not posted it on the ISS website.

best wishes
Joyce

On Thu, Sep 4, 2014 at 5:14 PM, Phyllis Wise <[REDACTED]<mailto:[REDACTED]>> wrote:

Joyce,

I actually have not seen the statement. I will look for it on their website.

Thanks for your continuing and unwavering support!
Phyllis

On Thursday, September 4, 2014 2:59 PM, Joyce Tolliver <[REDACTED]<mailto:[REDACTED]>> wrote:

Phyllis, last night as I was relaxing into an evening at home with some good books and a simple

dinner, I thought of you and hoped that you were able to do the same, finally, after your triumph yesterday.

Of course I should have known that you would instead be with the students, talking but mostly listening, once again putting into action the notions of tolerance and dialogue that you have worked so hard to imprint into our campus culture.

I've just read the statement that the study body president wrote and shared at last night's meeting. It is a source of inspiration and hope, and I also take it as a tribute to you and your work here.

Joyce

On Wed, Sep 3, 2014 at 10:27 PM, Phyllis Wise <
<mailto:[REDACTED]>> wrote:

Dear dear Joyce,

You are really so kind to write. I agree that Jim and I made a great team today and looked good in part because Dimitri looked so bad. We got what we needed today: tacit approval to go ahead with the business plan and the governance plan, even if they did not want to use the term "endorse". We'll have to finalize the finance plan and the MOU in time for the November meeting.

Apparently Julie Worth asked Jim and he said he had permission from his board to contribute \$100M and that he was unwilling to put that toward the UIC COM.. I wonder whether that will be headline tomorrow.

I spent the evening at the Student Senate meeting and their were students both for and against Saleita. I really hope that either the BOT will vote or we get some kind of settlement so that we can put that behind us. It is such a polarizing issue.

Thank you for all the work that you have put into the COM MOU. It will be more airtight because of all your efforts.

Best,
Phyllis.

On Wednesday, September 3, 2014 5:45 PM, Joyce Tolliver <
<mailto:[REDACTED]>> wrote:

Phyllis, you made us look SO good today! You projected confidence, energy, clarity, and vision. I was impressed and happy to see that you directly addressed a couple of the UIC "counter-proposal" points, and very convincingly.

Not that I'm biased or anything, but I thought you and Dr. Lennard presented an air-tight case. In fact, the weird committee befuddlement about process was probably because telling you not to go ahead was not even on their radar, after that presentation.

We are so very lucky to have you as our leader.

Joyce

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Joyce Tolliver

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Joyce Tolliver

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Joyce Tolliver

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Joyce Tolliver

From: Phyllis Wise [REDACTED] <[REDACTED]>
Sent: Saturday, September 06, 2014 7:14 PM
To: Paul Umbach
Subject: Re: Hi. I will be around all weekend for a call if you have time

Paul,

I have another phone conference call at 7:30-8:30. I will try to call you when we are done - assuming it does not go on and on....

Thanks for all the additional info. All good!

Phyllis

On Saturday, September 6, 2014 8:00 AM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Great! I have been living "behind the scenes" at Carle and have some insights and recommendation. Surely there is a three way game of "good cop / bad cops" being played with Jim, his CFO and his board related to forcing the university to put some money on the table. Yesterday on the finance call (I invited myself as I am never on these calls) I played "hard ball" with the CFO and finally accomplished an important step in the "cat and mouse game" – Carle has agreed to put their cards on the table in a document that will show the total (maximum) amount that they wish to contribute each year during a ten year period – with this total equaling the \$135 million fund raising goal established by the University. Only by playing the game with cards facing up, can the University know how much of a funding gap might exist in year "2" or "3" – a gap the I recommend should be covered by your foundation if funds cannot be raised at that time. Also – important – the Carle folks got the wrong idea that once you (the university at UC) reached \$135 million you would stop fundraising and thereby leaving a gap forever that Carle would need to cover. The REALITY is the CHILD (the medical school itself in close partnership with the two parents) will continue forever to raise funds with the goal of someday having an endowment of \$400 million. The Carle CEO finally "got it" when I said, that no one is putting a lid on fund raising and no one has the vision that the medical school will always have a funding gap – so stop stalling and give us a spreadsheet showing the money you are pledging year by year.

So, I want to go over this with you my friend so that we together can push this to the finished line.

One other topic—at my private lunch with Jim and Stephanie they mentioned great discomfort with the university's idea (I don't know where this is coming from) to hire a "pre-dean" or "planning dean" to provide guidance between the completion of the business plan and the hiring of the dean. They want Tripp Umbach and specifically our senior consultant Dr. Ken Ryan to play this role as we have the most experience with starting new medical schools – so they love Tripp Umbach afterall! I found this topic very interesting at multiple levels – so lets grab an extra glass of wine and add this to the agenda.

I will call around 7:30 your time.

Thanks.

Paul

Paul O. Umbach

Founder and President

Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313
Cell Number: [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

“Turning ideas into action for 25 years”

From: Phyllis Wise [mailto:[REDACTED]]
Sent: Friday, September 05, 2014 11:13 PM
To: Paul Umbach
Subject: Re: Hi. I will be around all weekend for a call if you have time

Paul,

I am free tomorrow evening after about 7pm and would love to talk.

Phyllis

On Friday, September 5, 2014 3:21 PM, Paul Umbach <PUMBACH@trippumbach.com> wrote:

Dear friend. I was able to have an important private lunch meeting with Jim and Stephanie on Wednesday and would like to give you some important insights on Carle's perspective. Thanks for letting me know when you might be able to chat. ☺

Paul O. Umbach
Founder and President

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Cell Number: [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

“Turning ideas into action for 25 years”

From: Paul Umbach <PUmbach@trippumbach.com>
Sent: Saturday, September 06, 2014 7:18 PM
To: [REDACTED]
Subject: FW: Presentation

FYI – I have been in touch with Tim casually behind the scenes. ☺

Paul O. Umbach
Founder and President

Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313
Cell Number: [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

“Turning ideas into action for 25 years”

From: Tim Koritz [mailto:[REDACTED]]
Sent: Saturday, September 06, 2014 8:14 PM
To: Paul Umbach
Subject: RE: Presentation

Hi Paul,

I think they did a great job and I agree, [REDACTED]
Looking forward to watch the project progress.
Thanks for all your help!

tk

From: PUmbach@trippumbach.com
To: [REDACTED]
Subject: RE: Presentation
Date: Sun, 7 Sep 2014 00:01:16 +0000

Thanks Tim! It was nice to be there to watch my team. I think we were all amazed by the “profound silence” after IUC’s dean did a combo presentation / dissertation on Ophthalmology and an impossible vision for UIC’s transformation that will not receive a penny of support from either Carle, OSF, or the private sector. I am looking forward to presenting the final business plan to you and others on your committee at the right time – as you will find it to be most feasible plan that has the focus and scale to be successful now and in the future. I am writing on your home email and I am the only person with access to my exceptionally private Tripp Umbach email – so please don’t be shy about responding with any questions or comments – as would enjoy a follow-up conversation as we prepare for November. Thanks. Paul

Paul O. Umbach

Founder and President

Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313
Cell Number: [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

"Turning ideas into action for 25 years"

From: Tim Koritz [mailto:[REDACTED]]
Sent: Thursday, September 04, 2014 6:53 AM
To: Peter B. Fox; Phyllis Wise; Adesida, Ilesanmi; Jim Leonard (James.Leonard@Carle.com); Stephanie Beever (Stephanie.Beever@carle.com); Paquin, Normand; Dan Peterson ([REDACTED]); Kaler, Robin Neal; Paul Umbach; Eardley, Jennifer J; Woodard, Jennifer L; Frerichs, Laura Appenzeller; DeLorenzo, Michael T; Schiffer, Peter E; Mike Billimack (Mike.Billimack@carle.com); Joe Barkmeier (Joseph.Barkmeier@carle.com); 'Lykins, Greg'; Rick Stephens (rick@investres.net); Chris Meyer (cmeyer@oktocom.com); Habeeb Habeeb; Miller, Gay Y; Alston, Reginald J
Subject: RE: Presentation

Dr.'s Wise and Leonard did a superb job with their presentations.
Glad I could be there to hear them and pleased to be able to serve the University of Illinois.

tk

From: peterf@fox-companies.com
To: pmwise@illinois.edu; iadesida@illinois.edu; James.Leonard@Carle.com; Stephanie.Beever@carle.com; paquin@illinois.edu; [REDACTED] rkaler@illinois.edu; PUmbach@trippumbach.com; jeadley@illinois.edu; jwoodard@uillinois.edu; lfrerich@illinois.edu; michaeld@illinois.edu; pschiffe@illinois.edu; Mike.Billimack@carle.com; Joseph.Barkmeier@carle.com; Gregory.Lykins@busey.com; rick@investres.net; cmeyer@oktocom.com; habeeb@bpcinc.com; gymiller@illinois.edu; alston@illinois.edu
CC: [REDACTED]
Subject: RE: Presentation
Date: Thu, 4 Sep 2014 09:35:55 +0000
Thank you and thank you Tim

From: Wise, Phyllis M [mailto:pmwise@illinois.edu]
Sent: Thursday, September 04, 2014 12:01 AM
To: Adesida, Ilesanmi; Jim Leonard (James.Leonard@Carle.com); Stephanie Beever (Stephanie.Beever@carle.com); Paquin, Normand; Dan Peterson ([REDACTED]); Kaler, Robin Neal; Paul Umbach (PUmbach@trippumbach.com); Eardley, Jennifer J; Woodard, Jennifer L; Frerichs, Laura Appenzeller; DeLorenzo, Michael T; Schiffer, Peter E; Mike Billimack (Mike.Billimack@carle.com); Joe Barkmeier (Joseph.Barkmeier@carle.com); 'Lykins, Greg'; Peter B. Fox; Rick Stephens (rick@investres.net); Chris Meyer (cmeyer@oktocom.com); Habeeb Habeeb; Miller, Gay Y; Alston, Reginald J
Cc: Koritz Tim
Subject: FW: Presentation

Dear All,

I am sure I have forgotten some people, so please pass this message on to others on the team. Please see the email from Bob below. I believe we made some progress today. Many thanks for all your efforts!

Best,
Phyllis

P.S. For some of you who may not know, Jim and I made a presentation to the University Health Systems Committee of the Board of Trustees. Dr. Tim Koritz chairs that committee and really helped us to get this on the agenda of his committee today; I have copied him.

From: Wise, Phyllis M
Sent: Wednesday, September 03, 2014 11:17 PM
To: Easter, Robert A
Cc: Clements, Vicki; Jim Leonard (James.Leonard@Carle.com)
Subject: RE: Presentation

Thanks for your support, Bob. Our team is going to put together key points that demonstrate that the current organizational structure and the one that Dimitri outlined just does not allow us to build what we envision we must have through a separate COM.

Phyllis

From: Easter, Robert A
Sent: Wednesday, September 03, 2014 8:37 PM
To: Wise, Phyllis M
Cc: Clements, Vicki
Subject: Presentation

Phyllis,

Great job with the presentation today. Now that this first step has been taken, I need to sit down with Secretary Kies and think through the process and decision points.

Bob

Robert A. Easter, Ph.D.
President, University of Illinois
364 Henry Administration Building
506 South Wright Street
Urbana, Illinois 61801
Phone: (217) 333-3070
FAX: (217) 333-3072
E-Mail: reaster@uillinois.edu
www.uillinois.edu

414 Administrative Office Building
1737 West Polk Street
Chicago, Illinois 60612
Phone: (312) 413-9097
FAX: (312) 412-8301

From: Phyllis Wise [REDACTED]
Sent: Monday, September 08, 2014 4:36 PM
To: Paul Umbach
Subject: Re: Hi. I will be around all weekend for a call if you have time

Are you free on Thursday evening?

On Monday, September 8, 2014 2:18 PM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Hi busy lady! I am in Washington DC for meetings today and tomorrow before traveling for meetings in Philly on Wednesday and Thursday. As of now, I am completely free on Wednesday evening. So just name a time and I will call you. Or – call me anytime on my cell and I will step out of whatever I am doing to go over things quickly. ☺

Paul O. Umbach
Founder and President

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“Turning ideas into action for 25 years”

From: Phyllis Wise [mailto:[REDACTED]]
Sent: Friday, September 05, 2014 11:13 PM
To: Paul Umbach
Subject: Re: Hi. I will be around all weekend for a call if you have time

Paul,

I am free tomorrow evening after about 7pm and would love to talk.

Phyllis

On Friday, September 5, 2014 3:21 PM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Dear friend. I was able to have an important private lunch meeting with Jim and Stephanie on Wednesday and would like to give you some important insights on Carle's perspective. Thanks for letting me know when you might be able to chat. ☺

Paul O. Umbach
Founder and President

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“Turning ideas into action for 25 years”

From: Phyllis Wise [REDACTED]
Sent: Saturday, September 13, 2014 1:36 PM
To: Paul Umbach
Subject: word from the living dead

Dear Paul,

I have been totally incommunicado of the past couple of weeks as I/we worked our way through some pretty ugly stuff - and we are not done yet. But I am relatively free this weekend. Am home most of this afternoon and almost all day tomorrow with the exception of a meeting with Normand at 2 pm. Would love to talk. Give me a couple of alternative times and I will call you.

Phyllis

From: Ilesanmi Adesida [REDACTED]
Sent: Wednesday, September 17, 2014 10:06 AM
To: Andreas Cangellaris
Subject: Re: Senate

Yes, indeed!

On Tue, Sep 16, 2014 at 6:58 PM, Andreas Cangellaris <[REDACTED]> wrote:
I am mobilizing our senators. We will need AHS, Business, Law, Social Work, and ACES senators on our side on Monday.

Sent from my iPhone

On Sep 16, 2014, at 6:33 PM, Ilesanmi Adesida [REDACTED]n> wrote:

I don't know the reason and the units. Nick sent me an email to this effect.
Ade

On Tue, Sep 16, 2014 at 4:50 PM, Andreas Cangellaris [REDACTED]n> wrote:
Do we know the reason(s) why? Which are the units mobilizing?

Sent from my iPhone

> On Sep 16, 2014, at 2:04 PM, Ilesanmi Adesida [REDACTED]n> wrote:

>
> Andreas,
>
> Please round up all engineering senate members; they need to attend the senate over the next few meetings especially this coming Monday. The rumor is that some are mobilizing to oppose the COM. It cannot fail before we get out of the gate!
>
> Ade

From: Phyllis Wise [REDACTED]
Sent: Monday, September 22, 2014 9:34 PM
To: Stephanie. Beever
Subject: today

Dear Steph,

I got your text and just wanted to thank you for sending it. I had been thinking about writing you to apologize for the faculty who embarrassed the university by their speech and their behavior. I am glad that you know me better than to believe some of the things I was accused of.

The statement that you made today about Carle's role in the College of Medicine was strong and convincing. Thank you for being so forceful. And the wonderful part about today was that the COM took another important step forward.

All the best,
Phyllis

From: Phyllis Wise [REDACTED]
Sent: Tuesday, September 23, 2014 10:05 PM
To: Ilesanmi Adesida; Normand Paquin
Subject: Fw: Per our conversation
Attachments: Scanned from a Xerox multifunction device001.pdf

FYI

On Tuesday, September 23, 2014 2:09 PM, James. Leonard <James.Leonard@Carle.com> wrote:

Per our conversation-please forward to Normand and others.

jcl

James C. Leonard, MD
President & Chief Executive Officer

We will be a world class innovator providing exceptional patient care and research

-----Original Message-----

From: u41f@carle.com [mailto:u41f@carle.com]
Sent: Tuesday, September 23, 2014 2:07 PM
To: James.Leonard
Subject: Scanned from a Xerox multifunction device

Please open the attached document. It was scanned and sent to you using a Xerox multifunction device.

Attachment File Type: pdf

multifunction device Location: Administration NC8 - B1914
Device Name: U41F

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9-23-2014

Hong Kong Leads U.S. College Gifts

BY JASON CHOW

HONG KONG—Two billionaire brothers' pledges this month of a combined \$370 million are just the latest example of Hong Kong's wealthy lining the coffers of U.S. universities.

The \$350 million gift by the younger brother, Gerald Chan, to Harvard University's School of Public Health, which will be renamed for the brothers' late father, is the largest gift in the school's history. Ronnie Chan's pledged \$20 million to the University of Southern California's occupational science and therapy program, which will be renamed after the brothers' still-living mother.

According to a Wall Street Journal analysis of U.S. Department of Education data, Hong Kong has been the top international source of large gifts to U.S. colleges, giving \$181 million during the period between January 2007 and November 2013, the longest continuous period of foreign-gift data available from the department.

Without counting the Chans' latest contributions, Hong Kong donations make up 17% of the world's total donations to U.S. universities, ahead of the U.K. (\$147.6 million) and Canada (\$136 million) over the period.

"Hong Kong is seen as the

New York of Asia," said Amir Pasic, vice president of international operations at the Council for Advancement and Support of Education in Washington. "All the fundraisers in the U.S. have to go to New York because the wealth is there. Now, so much wealth is in Hong Kong, so fundraisers go to Hong Kong as well."

The U.S. government requires all colleges to disclose to the Department of Education any gift over \$250,000 received from a foreign source; some colleges also disclose gifts of smaller amounts.

The biggest beneficiaries of Hong Kong residents' largess over the six-year period were the country's elite colleges. Princeton ranked first, with \$67.6 million, followed by Stanford University (\$39.3 million) and the University of California at Berkeley (\$28.8 million).

Harvard ranked fourth with \$19.6 million, though that doesn't include the latest donation from Gerald Chan.

"We ourselves are Western-educated," said Gerald Chan. "Many Hong Kong families have donated to American universities" because many have either attended or have children attending school in the U.S., he said.

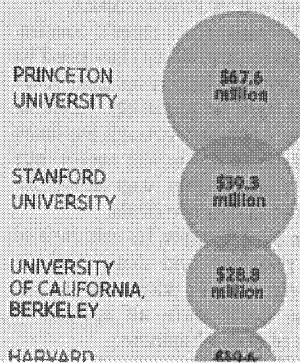
—Wei Gu
and Jennifer S. Forsyth
contributed to this article.

Gifted Education

Top 10 country donors to U.S. colleges from January 2007 to November 2013, in millions

Hong Kong	\$181.0
U.K.	147.6
Canada	136.0
India	97.5
Saudi Arabia	97.0
Switzerland	96.0
U.A.E.	75.4
China	60.4
Singapore	56.7
Japan	56.5

The biggest recipients of Hong Kong giving



From: Phyllis Wise [REDACTED]
Sent: Tuesday, September 23, 2014 10:06 PM
To: James. Leonard; Stephanie. Beever
Subject: Re: Per our conversation

WOW!!! I just sent this to Ade and Normand.

On Tuesday, September 23, 2014 2:09 PM, James. Leonard <James.Leonard@Carle.com> wrote:

Per our conversation-please forward to Normand and others.
jcl

James C. Leonard, MD
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Device Name: U41F

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From: Adesida, Ilesanmi <iadesida@illinois.edu>
Sent: Wednesday, September 24, 2014 12:34 AM
To: Phyllis Wise; Paquin, Normand
Subject: RE: Per our conversation

Amazing! We need to get there to line up for Illinois!
Thanks.

From: Phyllis Wise [REDACTED]
Sent: Tuesday, September 23, 2014 10:05 PM
To: Adesida, Ilesanmi; Paquin, Normand
Subject: Fw: Per our conversation

FYI

On Tuesday, September 23, 2014 2:09 PM, James. Leonard <James.Leonard@Carle.com> wrote:

Per our conversation-please forward to Normand and others.
jcl

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President & Chief Executive Officer

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From: Ilesanmi Adesida [REDACTED]
Sent: Wednesday, September 24, 2014 1:53 AM
To: [REDACTED]
Cc: Ilesanmi Adesida
Subject: Re: Greetings

[REDACTED]
I hope all is well and that your [REDACTED] Please extend our warmest regards to her.

On our visit to Taipei, the Chancellor and I will be sending our detailed itinerary to you. We will arrive in Taipei on the evening/night of November 1st. I will leave on the afternoon of November 4th for Singapore while the Chancellor will depart on November 5th. We have the whole of November 2nd free. There are some events surrounding a joint conference on the theme of "Smart Cities, Healthy Cities" at the National Taiwan University NTU) on November 3rd and 4th. There are many Illinois Professors and administrators coming for the conference. I would like to talk to you to make arrangements for the visit. The Chancellor and I would like to meet you and others to be able to share our vision of the Medical School that we are contemplating. I sent an email to you and [REDACTED]. We are at the beginning of the journey and we need partners around the world to make this happen.

Your assistance is very much valued and appreciated. Your generosity and service to Illinois is phenomenal! We need more great and grateful alumni and friends like you to make Illinois a great and enduring institution competing with the world's best!

Thanks.

Ade

On Mon, Sep 1, 2014 at 1:34 AM, Ilesanmi Adesida [REDACTED] <[REDACTED]> wrote:

[REDACTED]
Our best wishes to your [REDACTED] Greetings to all.

Ade

On Sun, Aug 31, 2014 at 7:46 PM, <[REDACTED]> wrote:

Dear Ade,

I have penciled in the date. Sorry for the late reply. My [REDACTED] was in the [REDACTED]
[REDACTED] She is [REDACTED] years old. So, We all keep a very close eye on her [REDACTED]

[REDACTED]
Best wishes to you and your families.
[REDACTED]

副本抄送 : Ilesanmi Adesida <[REDACTED]>

寄件人 : Ilesanmi Adesida <[REDACTED]>

日期 : 2014/08/28 下午 02:48:26 EST

主旨 : Greetings

Dear [REDACTED]

How is it going? Sorry for not staying on touch for the past few months. We are still planning on being in Taipei in November. Specifically, there is an event at National Taiwan University on November 3rd and 4th that the Chancellor and I will attend. We are trying to fix out trip so that we can arrive on Saturday, November 1st and have all day free on the 2nd to meet with you. Hopefully, that will be a good time for you. We are working on the calendar and keep trying to move things around. I will send an email next week to confirm all these and also call as necessary.

Please extend my greetings to the family.

Ade

From: Phyllis Wise [REDACTED]
Sent: Wednesday, September 24, 2014 12:01 PM
To: Normand Paquin
Subject: Re: Fwd: Report input

Normand,

I don't mind not including the names of the other potential institutions in this document. It is clearly a sensitive point for Carle. We need to continue to work with them to emphasize that additional partners, particularly if they do not adequately fund the partnership. I would let it go for now.

Phyllis

On Wednesday, September 24, 2014 7:27 AM, Normand Paquin [REDACTED] wrote:

Phyllis,

Take a look at the email exchange here and let me know if you have any strong position on the matter.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED] 

----- Forwarded message -----

From: **Normand Paquin** <[REDACTED]>
Date: Wed, Sep 24, 2014 at 7:23 AM
Subject: Re: Report input
To: Beth Paul <BPaul@trippumbach.com>

Thank you Beth. We had included the language to signal openness to working with others including UIC and local partners that have some political constituencies but I know Carle is particularly concerned about the practices of one of those named. I'll seek some guidance on how to respond to this. In the mean time, I would certainly remove "[REDACTED]" since that opens the door to not including any.

Best, Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: +1-217-819-8964

On Wed, Sep 24, 2014 at 6:50 AM, Beth Paul <BPAUL@trippumbach.com> wrote:
Hi, Normand.

I am starting to go through Steph's input to the business plan and came across the following paragraph just now. The report which includes Steph's input is also in the eroom, so you can review the whole report, but I thought I would give you a heads-up in case the following requires some follow up. I wasn't sure if the highlighted part below was included in your input to the report because you feel strongly it should be included or/and if it is there because of specific direction from Phyllis, but Steph has deleted it from the latest version of the business plan (which is still in track changes, so it is not permanently deleted). Also copied below are her comments that she added into the report. Let me know how you would like me to proceed--if this requires follow up or if you think it is fine to leave it as Steph wants it to read.



Steph's comments: I am not comfortable explicitly stating other institutions names within the business plan as we have not yet determined who are appropriate partners to further the intent of the COM.

Beth Paul
Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313
Cell Number: 412.759.9769
Fax Number: 412.281.9946
www.trippumbach.com

"Turning ideas into action for 25 years"

From: Ilesanmi Adesida [REDACTED]
Sent: Wednesday, September 24, 2014 1:38 PM
To: Phyllis Wise
Subject: Fwd: FW: Per our conversation
Attachments: Scanned from a Xerox multifunction device001.pdf

FYI. I am waiting for the reply.

----- Forwarded message -----

From: **Ilesanmi Adesida** <[REDACTED]>
Date: Wed, Sep 24, 2014 at 1:38 AM
Subject: Fwd: FW: Per our conversation
To: [REDACTED]
Cc: [REDACTED], Ilesanmi Adesida <[REDACTED]>

Hi [REDACTED]

I had been looking for a date for us to visit Hong Kong. We have had some challenging issues on our campus which delayed my reply. Is it possible for us to come and visit on December 15 and 16th. We will leave here on December 12 and get to HK on the 13th or 14th. We would have liked to come earlier but it has been difficult with our ongoing challenges.

Notwithstanding, we have begun seeking the approval processes for an Engineering-Driven College of Medicine that we would like to create on our campus. This will be a new type of medical school at the intersection of engineering, technology, big data, biomedical sciences, and healthcare. No school has done this in the US or in the world! We have the intellectual depth to realize this! We would not be owning a hospital but partner with Carle Health System which has a 400-bed hospital in town. We need to raise some funding on our side to establish the College which is now our main focus. We should raise \$200M in the next few years to make this a reality! if we could do this, it will transform the future of the campus and we believe that it will transform the future of health care. Prevention, Predictive, Participatory are our watchwords in trying to bring better healthcare to more people at lower cost!

So this is the beginning of our efforts! We would like to present our vision to [REDACTED] and see whether we can persuade them to lead or participate in this vision and journey.

I am attaching a document that I found about some other foundations funding initiatives in the US.

Please let me know what you think about the dates.

Thanks.

Ade

9-23-2014

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BY JASON CHOW

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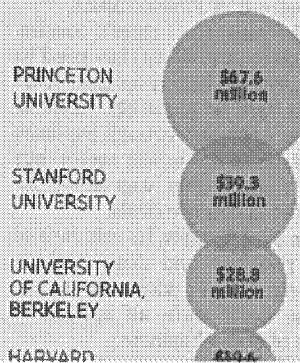
—Wei Gu
and Jennifer S. Forsyth
contributed to this article.

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Canada	136.0
India	97.5
Saudi Arabia	97.0
Switzerland	96.0
U.A.E.	75.4
China	60.4
Singapore	56.7
Japan	56.5

The biggest recipients of Hong Kong giving



From: Normand Paquin [REDACTED]
Sent: Thursday, September 25, 2014 7:07 AM
To: Phyllis Wise
Subject: Re: FYI

I'll be please to take part.

Normand

On Sep 24, 2014 10:52 PM, "Phyllis Wise" [REDACTED] > wrote:
FANTASTIC. I have scheduled meeting with Walt Knorr, and assuming that goes well, I hope to schedule a meeting with Bob right after that, and then with Kennedy, then Koritz. I hope you can be at all of them.

On Wednesday, September 24, 2014 10:20 PM, Normand Paquin [REDACTED] wrote:

Just as an FYI: I think I have a budget that works. Requires green light on some things but I think we are there. Meeting with Vicky early, then Mike D. then Mike Bass (with Vicky and Mike D.) and then Carle.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Te [REDACTED]

From: Normand Paquin [REDACTED]
Sent: Saturday, September 27, 2014 9:06 PM
To: Phyllis Wise; Adesida, Ilesanmi
Subject: Fwd: Revisions
Attachments: 20140926 Carle UIUC COM Draft Financial Model_v25.xls

Phyllis, Ade

This is what I sent to Stephanie. The total for the facilities is \$46 M in this revised budget (\$17 M before).

We'll have to see what the reaction is.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED] 

----- Forwarded message -----

From: **Normand Paquin** <[\[REDACTED\]](#)>
Date: Sat, Sep 27, 2014 at 8:12 PM
Subject: Revisions
To: Stephanie Beever <Stephanie.Beever@carle.com>

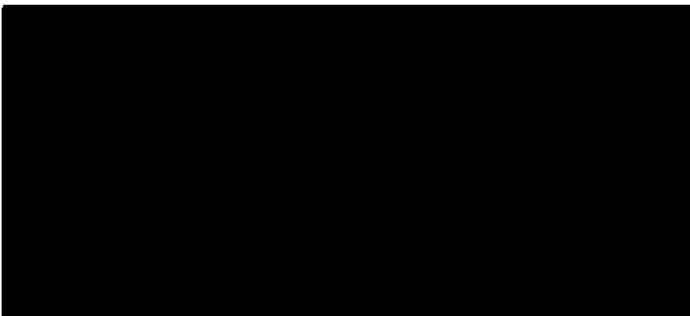
Steph,

Thanks for the chat earlier today. I had a go at revising the budget as discussed.

I thought it might be best to simply exchange this with you instead of posting it. I figure we should post it when we are both OK.

You'll see that I basically try to get to about \$10M as quickly as possible (i.e. getting to about half-teach-out (~22M - conservative calculation)) and also having capital reserves of decent size) and then flattening the curve. Also make sure we stay about \$0 with a reasonable margin.

Just to put some context to it:



Have this notion that we might have two spurts of growth in space: one around yr 7-8 and one around year 9-10 as we get set for years 11 onwards and growth still to come in student numbers.

Changes are on line 249 and 250 of the long operating statement

[REDACTED]

And I also added to the IT line below that one. Initially it was with idea to restore what had been cut from original budget but then I realized that all that additional space would need new IT as well. So I think notion that this could also be based on assumption that this had to be adjusted if we now worked on basis that all UIC students and staff would remain on both our sites can be source of this.

[REDACTED]

With respect to teach-out, I think we can expect to have gift money we can tap to help cover it

Let me know as soon as possible if this is OK fro presentation.

Normand.

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

From: Phyllis M Wise [REDACTED]
Sent: Saturday, September 27, 2014 9:18 PM
To: Normand Paquin
Subject: Re: Budget

My own sense is that we would need to figure that later. It is better not to have too much in reserve than to have enough in case of a teach-out. Having too large a reserve will make people really wonder whether we have a practical view of budgeting.

Sent from my iPhone

On Sep 27, 2014, at 7:42 PM, Normand Paquin <[REDACTED]> wrote:

The teach-out was estimated to cost \$22M. If we have only \$10.8 M in the surplus (where I am now), do we risk having people say that we will have to go to the state for new GRF or raid other colleges to cover gap should the teach-out occur? Mind you, it might not be the case if we have some unrestricted cash gifts we can tap into.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Sat, Sep 27, 2014 at 4:26 PM, Phyllis Wise <[REDACTED]> wrote:
Normand,

I am fine with stating the additional capital funding is needed for addition of new space and additional renovations. I don't know what you mean by "too low" is the \$10M alright. I think that making it as high as it is now makes everyone wonder how realistically we are thinking.

I will send you the letters and also correspond with Jim.

Phyllis

On Saturday, September 27, 2014 4:12 PM, Normand Paquin
<[REDACTED]> wrote:

Spoke to Stephanie,
Very concerned about allocating new money for new building. This will raise all sorts of questions and red flags with their BOT. Suggest instead to put money towards addition of new space and additional renovations based on assumption current UIC students and current COM personnel will still occupy space they currently have. Actually true for Carle. Also concerned that if we make surplus too low, UIUC then opens itself to claim that we will have to go to the state for GRF funds if teach-out is required and Carle versus their bot. Suggestion is not to go too low. Told her I would get your opinion.

Plan to get a budget to Steph tonite with her OK sometime tomorrow (not too late). I think telling Jim Roth that we would like 7 AM meeting to go through budget on Monday would be best with our goal to get him the budget by 7 PM tomorrow as we work on last touches with Carle.

Thoughts?

Normand

From: Normand Paquin [REDACTED]
Sent: Sunday, September 28, 2014 2:30 PM
To: Phyllis Wise
Cc: Ilesanmi Adesida
Subject: Re: Revisions

Phyllis,

I am happy to say every worksheet is labeled as draft and confidential. I did send it out. I have not had any feedback from Stephanie or anyone from Carle at this point.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Sun, Sep 28, 2014 at 1:20 PM, Phyllis Wise [REDACTED] wrote:
Normand,

I may be too late: Just be sure to mark it draft and confidential.

Phyllis

On Sunday, September 28, 2014 12:00 PM, Normand Paquin [REDACTED] wrote:

I have not heard from Stephanie.

I will send out the version to Jim Roth at ~1:30 PM even if I don't hear from her (with the caveats Phyllis has already communicated to Jim Roth).

I'm also removing some worksheets from TU that contain financial numbers and many initial assumptions that are no longer applicable.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Sun, Sep 28, 2014 at 8:29 AM, Ilesanmi Adesida [REDACTED] wrote:

Thanks, Normand. Hopefully, she will agree with the new outline of the budget. I have a feeling that she will want to share it first with their CFO before making the final call.

Ade

On Sat, Sep 27, 2014 at 9:06 PM, Normand Paquin <[REDACTED]> wrote:
Phyllis, Ade

This is what I sent to Stephanie. The total for the facilities is \$46 M in this revised budget (\$17 M before).

We'll have to see what the reaction is.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

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Date: Sat, Sep 27, 2014 at 8:12 PM
Subject: Revisions
To: Stephanie Beever <Stephanie.Beever@carle.com>

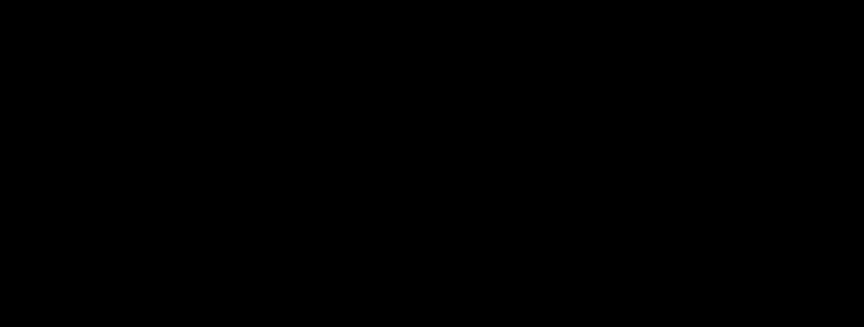
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I thought it might be best to simply exchange this with you instead of posting it. I figure we should post it when we are both OK.

You'll see that I basically try to get to about \$10M as quickly as possible (i.e. getting to about half-teach-out (~22M - conservative calculation)) and also having capital reserves of decent size) and then flattening the curve. Also make sure we stay about \$0 with a reasonable margin.

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[REDACTED]

And I also added to the IT line below that one. Initially it was with idea to restore what had been cut from original budget but then I realized that all that additional space would need new IT as well. So I think notion that this could also be based on assumption that this had to be adjusted if we now worked on basis that all UIC students and staff would remain on both our sites can be source of this.

[REDACTED]

With respect to teach-out, I think we can expect to have gift money we can tap to help cover it

Let me know as soon as possible if this is OK fro presentation.

Normand.

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

From: Phyllis Wise [REDACTED]
Sent: Monday, September 29, 2014 10:51 PM
To: Normand Paquin
Subject: Fw: Carle-UIUC partnership

FYI

On Monday, September 29, 2014 10:50 PM, Phyllis Wise <[REDACTED]> wrote:

Dear Jim,

I called your cell phone this evening but could not leave a message. I know you are away, so I want to email you so that you have this message as quickly as possible.

I talked with Steph this evening and realized that some of our actions make it appear that we do not consider Carle as true partners in our goal of establishing a College of Medicine. Let me assure you that we consider our partnership with you as one of equals. I am very sorry if we have not conveyed this and we will do everything we can to correct that impression. Please be assured that I/we have the greatest respect for you and Carle Health Systems.

I hope you and I can meet when you and I get home. Perhaps we should set up regular weekly phone or person to person meetings to be sure that are aware of each others thinking.

Best,
Phyllis

From: Phyllis Wise [REDACTED]
Sent: Tuesday, September 30, 2014 4:46 AM
To: Beever Stephanie
Cc: Normand Paquin
Subject: Yesterday

Steph,

Thanks for the frank and candid discussion last night. As I said, we will try harder to demonstrate that we truly believe that the partnership with Carle is one of equal partners. Even with the different constituencies, political and academic, and dates that we are trying to accommodate, we will certainly be alert to the fact that you too have people that need to be reassured of the importance of this vision and long term value of our partnership.

We will keep the budget as it was last week for our discussions this week with the President, Walt Knorr etc. I do hope we will have a chance to review it before it goes too much farther. I am still concerned that the size of the surplus at the end is more than is needed for the LCME teach out. And it gives the wrong impression to your and our board about the real costs. I would hate for anyone to think that this amount will really be left at the end of the 10 years and that further investment will not be required or even that the initial investment of \$100m from Carle or our investment in philanthropic efforts as well as our other components are not required.

I am off to NY right now and would love to talk again when I return. In the meantime, I know that you (plural) and Normand and our people have additional meetings. I hope they reflect the fact that we respect the partnership and the importance of all your/our planning.

Best,
Phyllis

PS I wrote an email to Jim last night. I did not get through to him on his cell phone.

Sent from my iPad

From: Normand Paquin [REDACTED]
Sent: Tuesday, September 30, 2014 6:39 AM
To: Phyllis Wise
Subject: Re: Response to your text

No worries. I certainly don't plan to bring this up. I just wanted you to be informed.

Normand

On Sep 30, 2014 3:47 AM, "Phyllis Wise" [REDACTED] > wrote:
Normand,

I am not sure it is worth arguing about now. They are really upset that we changed the budget at the last minute. Steph said it was symbolic bout the way we tell them at the last minute or after the fact. You know the nature of the conversations better than I do. If we can get the surplus down to \$20m it would be great. But I am afraid that if we try to do that, they will still be angry about the principle and may want to go back and look at all the previous cuts. I don't think I got my point across that such a large surplus will make people wonder about our ability to create a budget. I think they understand that this budget is our best estimate for now.

I am worried about what you said that their BOT will like the surplus because they will think that they don't have to put in more.

I guess I wish I had caught the large surplus earlier. a lot earlier. We have some fences to mend.

Phyllis

Sent from my iPad

From: Phyllis Wise [REDACTED]
Sent: Wednesday, October 01, 2014 7:00 AM
To: Normand Paquin
Subject: Re: Update

Sounds very good.

On Tuesday, September 30, 2014 9:03 PM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

We are set to use last Thursday's budget for our near term meetings but we'll take the next couple of weeks to review the budget and get to a ~12M surplus by year 10. Apart from revisions in expenses, we agreed to move excess into an endowment.

Terms attached will work in my opinion. Dan and Molly contributed.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel: + [REDACTED]

From: James.Leonard <James.Leonard@Carle.com>
Sent: Wednesday, October 01, 2014 7:52 AM
To: Phyllis Wise
Subject: Your Note

Dear Phyllis,

Thank you for your note and comments on our partnership around the COM. I have delayed my response because I have been very busy with this meeting and frankly because I needed to put my thoughts in order. The unilateral decisions over the weekend around the budget were a surprise that had the potential to totally reframe the project and partnership in the direction that Carle has with UIC COM today. I point out that connection because I know it is in the mind of the Carle people from years of interaction and that fear has been the source of much of the internal resistance. It may not be fair to UIUC but that has been the reality. You, Normand and others have done much to build trust and a new connection but it remains fragile and there are gaps in our understanding (as there are gaps in your understanding of us). No one has doubted the integrity or intent of you or your team but it is easy to fall back on established habits and approaches- particularly when we are trying to reach a goal with a tight timeframe. I agree that as we enter this phase we should be closer than ever in our meetings and conversation. I look forward to bringing the prize home- together.

Jim

Sent from my iPad

From: Normand Paquin [REDACTED]
Sent: Wednesday, October 01, 2014 12:50 PM
To: Phyllis Wise; Laura Frerichs; Adesida, Ilesanmi
Subject: Fwd: Draft Report
Attachments: Final Draft Carle UIUC COM Business Plan October 1 2014.docx

Current draft.

Sections highlighted are sections that will be reviewed when financials and MOU are finalized.

Please review and provide comments to me by Sunday morning (except for Laura who is on vacation).

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED] 

----- Forwarded message -----

From: **Beth Paul** <BPaul@trippumbach.com>
Date: Wed, Oct 1, 2014 at 12:31 PM
Subject: Draft Report
To: "Normand Paquin' [REDACTED] <[REDACTED]>

Hi, Normand, let me know if you have questions or revisions.

Beth Paul

Tripp Umbach
2359 Railroad St. #3701

Pittsburgh, PA 15222

Corporate Headquarters: [412.281.2313](tel:412.281.2313)

Cell Number: [REDACTED]

Fax Number: [412.281.9946](tel:412.281.9946)

www.trippumbach.com

“Turning ideas into action for 25 years”

From: Lykins, Greg <Gregory.Lykins@busey.com>
Sent: Thursday, October 02, 2014 4:06 PM
To: Phyllis M Wise; James Leonard
Subject: Fwd: Introductions

fyi ...

Sent from my iPad

Begin forwarded message:

From: "Lykins, Greg" <Gregory.Lykins@busey.com>
Date: October 2, 2014 at 4:03:38 PM CDT
To: "Ghosh, Avijit" <ghosha@UIC.EDU>
Cc: Jim Roth <jroth@huronconsultinggroup.com>, "Marsh, Teresa" <Teresa.Marsh@busey.com>
Subject: Re: Introductions

Jim and Avijit,

Thank you for the email .. I am in [REDACTED] returning this weekend. I will have my assistant, Teresa Marsh work to schedule a time to visit.

Thank you .. all the best and have a great weekend,

Greg

Gregory B. Lykins, Chairman
First Busey Corporation
100 W. University
Champaign, IL 61821
greg.lykins@busey.com
Office: 217.351.6535
Cell: [REDACTED]

Sent from my iPad

On Oct 2, 2014, at 3:55 PM, "Ghosh, Avijit" <ghosha@UIC.EDU> wrote:

Dear Greg and Jim,

Please pardon the informality of email introduction—but I wanted to connect the two of you.

Greg, as I have mentioned in my earlier email to you Jim is helping President and I and the Board to understand all the facets of proposals regarding medical school in Urbana. He would like to speak to you to learn more about the community perspective on this. And of course your personal thoughts are important to us.

Jim, as you know Greg is one of the most respected community leaders of Champaign-Urbana.

Hope both of you can connect soon.

Regards, Avijit

Avijit Ghosh
CEO
University of Illinois Hospital
1740 W. Taylor Street Suite 1400
Chicago, IL 60612

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From: Peter B. Fox <peterf@fox-companies.com>
Sent: Friday, October 03, 2014 7:06 AM
To: Phyllis Wise
Cc: Lykins, Greg; James Leonard
Subject: Re: Greeting and request

Greg I am going by to see Jim personally monday. We only spoke on phone. Call me when you're back and I'll brief you

Sent from my iPhone
Peter fox

Peteerf@fox-companies.com

On Oct 3, 2014, at 6:19 AM, Phyllis Wise <[REDACTED]> wrote:

Greg,

Bob Easter has said that he will depend upon Jim Roth's advice more than either Tripp-Umbach or Manatt (the UIC consultant) because he believes that Huron will be objective. Peter has spoken with him and given the perspective of the community and how important this would be for Urbana-Champaign/central Illinois, and the rest of the state. I have copied him here. We have emphasized that this critical to the future of UIUC and Carle and will not harm, and in fact, will help UIC.

As a respected community leader, I am sure that Jim will pay attention to the perspective that you provide.

Thanks so much for taking the time,
Phyllis

PS Hopes your travels have gone well!

On Thursday, October 2, 2014 4:05 PM, "Lykins, Greg" <Gregory.Lykins@busey.com> wrote:

FYI .. Any "coaching" is invited ...

Greg

Sent from my iPad

Begin forwarded message:

From: "Ghosh, Avijit" <ghosha@UIC.EDU>
Date: October 2, 2014 at 7:41:09 AM CDT
To: "Gregory.Lykins@busey.com" <Gregory.Lykins@busey.com>
Subject: Greeting and request

Dear Greg,

I am writing to ask for a favor. You may be aware that Jim Roth, CEO of Huron Consulting, has been advising Bob Easter and me (and the

trustees) on how best to consider the two medical school proposals. Both Bob and I have suggested to Jim that he should have a conversation with you to get your perspectives. He has also spoken to Peter Fox for the same purpose.

Later today I plan to send an electronic introduction to both of you. I hope that is ok.

As you may already know Huron is one of the leading consultants in both the higher education and healthcare domains.

Thanks so much for your help.

Avijit

\

PS. I am sorry I missed the foundation meeting this year. Last minute issues in Chicago kept me from driving to Urbana on Friday morning.

Avijit Ghosh
CEO
University of Illinois Hospital
1740 W. Taylor Street Suite 1400
Chicago, IL 60612

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From: Phyllis Wise [REDACTED]
Sent: Friday, October 03, 2014 10:45 PM
To: Normand Paquin
Subject: Re: Updated Stephanie

thanks for getting to Steph so quickly.

On Friday, October 3, 2014 3:09 PM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

I updated Steph at a high level about our discussion with Bob.

There is no resolution from their BOT to show but the MOU will convey commitment.

She will go back to ask if they can insert binding clause even if acquired.

Also told her about his interest in MD-PhDs.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED]

From: Phyllis Wise [REDACTED]
Sent: Saturday, October 04, 2014 10:34 PM
To: Phyllis Wise
Subject: Fw: Modern Healthcare
Attachments: 10.3.14 Modern Healthcare - Univ. of Illinois campuses debate dueling medical college needs.pdf

On Friday, October 3, 2014 10:43 PM, Phyllis Wise [REDACTED] wrote:

On Friday, October 3, 2014 8:41 AM, James. Leonard <James.Leonard@Carle.com> wrote:

Phyllis

Here is the latest article prompted after the Tribune article – a variation of this may appear in Crain's since the organizations are connected. Looks like Dmitri's total strategy is to hi-jack the idea rather than any other offer or detail.

Modern Healthcare is a national magazine distributed to healthcare and located in Chicago.

Jim

James C. Leonard, MD
President & Chief Executive Officer

We will be a world class innovator providing exceptional patient care and research

From: Jennifer.Hendricks-Kaufmann
Sent: Friday, October 03, 2014 8:35 AM
To: Stephanie.Beever; Joseph.Barkmeier; James.Leonard; Mike.Billimack
Subject: FW: Modern Healthcare

Good morning,

The online version of the Modern Healthcare article is attached. Please note this publication always uses a portion of the bed composite listed by IDPH and has CFH at 322 which we have argued against for years.

I hope the print version for Monday's publication will go into greater depth. This will be distributed for We're in the News, which will be out late this morning – wanted you all to see this first.

Thank you,
Jennifer

Univ. of Illinois campuses debate dueling medical college needs

By Andis Robeznieks

Posted: October 2, 2014 - 6:45 pm ET

Tags: [Education](#), [Illinois](#), [Physicians](#)

Two branches of the University of Illinois are wrangling over whether to establish a new medical college in the state.

The University of Illinois Urbana-Champaign campus has [proposed](#) opening a 25-student college where the university's well-known College of Engineering is located. University officials are touting the school as the first in the country to combine engineering and medical education, to prepare students for a future in which healthcare and technology are increasingly inter-related. The school would grow to 50 students per graduating class over six years.

But the University of Illinois at Chicago, where the university's existing medical school is headquartered, has responded with its own plan to create a new "[translational bioengineering institute](#)" based in Chicago but including the University of Illinois' three other College of Medicine campuses in Peoria, Rockford and Urbana-Champaign.

Further discussions are expected at a Nov. 3 meeting of the University Healthcare System Committee and at a Nov. 13 meeting of the University Board of Trustees.

Dr. James Leonard, president and CEO of the 322-bed Carle Foundation Hospital in Urbana, said Carle has committed to contributing \$100 million over 10 years to support the downstate project. Leonard said his institution is "all in on the idea."

The concept was first discussed last summer when the hospital and the university, which represent the area's two largest employers, discussed economic development strategies.

"The state of Illinois has struggled in its economic recovery and Champaign-Urbana is not immune to that," Leonard said. "We have one of the top engineering campuses in the world, and that led to the discussion of how nobody in the world has a medical campus that begins and ends with engineering."

The proposal differs from the Harvard University-Massachusetts Institute of Technology [Health Sciences and Technology program](#) which is a collaboration rather than a hybrid institution, Leonard noted.

[Dr. Dimitri Azar](#), dean of the University of Illinois College of Medicine in Chicago, argued that resources would be better spent building on the school's existing infrastructure rather than on a startup.

"The future of medicine and the college of medicine of the future will be a convergence of medicine and technology—tempered by the humanistic aspects of medicine," Azar said, noting that the university's existing college of medicine already has 190 students pursuing dual M.D.-PhD. degrees.

Despite the dispute, Azar referred to the Urbana-Champaign campus and Carle Foundation Hospital as partners of the College of Medicine.

"I prefer not to criticize—that's not my style," he said. "In the end, I'd rather talk about the future of medicine rather than whether we have one medical school or two."

The University of Illinois College of Medicine had an active enrollment of 1,327 for the 2013-14 academic year, losing its former title as the nation's largest medical school to Indiana University School of Medicine which had 1,350 students.

A new downstate engineering-medical college would be a boon to recruitment efforts, Leonard said. Carle is an integrated system with its own health plan and more than 400 employed physicians. Short-term plans call for adding 130 to 150 more doctors, but seeking further growth five to 10 years down the road could be a struggle.

The new Urbana-Champaign medical school "would become a bright light to attract physician-scientists," Leonard said. "Even if they're not interested in research, they would be attracted by an environment of innovation."

Azar predicts the same future for his Chicago plan, describing it as a major economic benefit for the state.

"The journey from the lab to the clinic will be shortened," he said. "Engineers will come up with ideas that doctors will find ways to apply. Doctors will start to think 'What is the engineering solution to the problem I'm facing?' instead of just accepting that this is the way things are."

Follow Andis Robeznieks on Twitter: [@MHARobeznieks](#)

From: Cangellaris, Andreas C <cangella@illinois.edu>
Sent: Sunday, October 05, 2014 11:22 PM
To: Ilesanmi Adesida
Subject: Possible article
Attachments: Possible article.pdf; ATT00001.txt

Ade, please see attached.

let's talk tomorrow.

Thanks,

Andreas

Somewhere in Avalon Park a woman is post-op, waiting for pathology to determine if she is cancer free. In Mt. Prospect, a family is weighing the side effects their son will suffer when he begins taking medicine to treat his epilepsy. For a family in Decatur, end-of-life decisions become financial decisions.

There is a future in which those things don't have to happen.

Inventions that merge engineering and medicine are in the works that will allow surgeons to make sure they've gotten the entire tumor before they close up the patient. An electrode array, smaller than a postage stamp, is being developed that will mold to your brain's folds and treat seizures. An app will use your smart phone's camera to test for allergens in your kid's lunch.

And they're all being invented right here in Illinois. Students and professors at the Urbana-Champaign campus of the University of Illinois are tackling healthcare's runaway costs with systems engineering thinking and are pushing hard to make sure that better medical treatment and hope reaches more and more people.

Urbana-Champaign is ready to transform the future of medicine and healthcare by building the world's first engineering-based college of medicine -- at no additional cost to taxpayers. And their health care provider neighbor in Urbana, the Carle Foundation, is committing \$100 million as their partner to get the ball rolling with this gutsy endeavor. They hope to have it approved by the end of the year and start admitting students in 2017.

The university's chancellor, Phyllis Wise, is confident that this is a game changer. She told the *Tribune* that by bringing the university's world-renowned college of engineering to bear on challenges in medicine and healthcare the university can up its overall prestige, attract tens of millions of new research dollars from the NIH, bolster economic growth in the state, and keep many more of our talented university graduates at Illinois.

She's is right. But it was clear in the *Trib* last week that not everyone agrees.

The dean of the University of Illinois at Chicago's medical school wants to keep the entire system's healthcare education activities under UIC's control. University of Illinois Board of Trustees' Chair Christopher Kennedy says he's open to UIUC's proposal but wants to prolong the decision-making process and see if they can just tweak things around the edges

Illinois -- the state and its flagship university -- cannot drag their feet on this.

Technology is revolutionizing healthcare and medicine and the associated educational ecosystem needs to be shaken up and reinvented to take advantage and fuel the success of this revolution. The new breed of medical college that UIUC proposes to build is going to happen. It's going to educate and train a new generation of doctors who will combine compassion with a quantitative outlook. These will be the inventors of pacemakers that are powered by the beating of one's own heart, the adopters of nanobots that swim in one's bloodstream and deliver medicine right to its target, while providing real-time monitoring of the health of the circulatory system.

It might sound counter-intuitive, but they'll be technologists with a human touch, physicians with much more time dedicated to engaging with the patient, while sophisticated computer systems behind the scenes take care of the diagnosis with unprecedented accuracy.

Those doctors and the amazing technologies they'll inspire, invent and employ will benefit all of us personally. More people will be much healthier, and we'll start to contain out-of-control medical costs.

The economic benefits for Illinois will be vast, too. We have had our chances before. The web browser, the visible LED, the PLATO computer system for computer-aided education and social networking -- they were all invented by Illinois engineers. Let's capitalize on this opportunity in a way we didn't in those.

The University of Illinois at Urbana-Champaign and its engineering college are uniquely positioned to undertake this ambitious task, but the new landscape it creates will be a huge win not for Urbana-Champaign but for Chicago and the entire state.

A Silicon Valley for Medicine 2.0 will be built somewhere -- San Francisco, Boston, New York, Seoul, Singapore, Shanghai. Let's make it Chicago, and let's start building it right now on the shoulders of one of the most influential engineering college in the world.

Message

From: Phyllis Wise [REDACTED]
Sent: 10/7/2014 9:56:16 PM
To: Woodard Jennifer [REDACTED]
Subject: Ed

Jennifer,

I thought I should answer your text thru email since I wanted to write more than just a few sentences. Ed is just amazing!!! He had spent the whole day with us (I was not with them for any part of it). Peter had put together a spectacular itinerary to show him the power if our research that he/we did not think he knew about. I was not with them, but from all reports Ed really enjoyed all the information and asked important questions. Apparently Paula found out about this and told Mitra to give Ed a tour of UIC....

He had dinner with Peter, Jennifer Eardley, Neal Cohen, Jim Leonard (who he met once before a long time ago), Ade, Molly, and me. The conversation was great. At the end Jim asked him some pretty direct questions and Ed was totally frank and direct. Jim said that he could be doing something else with his \$100m but he thought that our project was more important. I told them that I would be meeting with Chris tomorrow and he said that if Chris tries to keep this off the November agenda that there would be a few trustees who would be unhappy (himself, Koritz, and Strobel - I did not know I could count on her).

Anyway it was a great dinner and Ed was magnificent.

Wish me luck tomorrow.
Phyllis

Sent from my iPad

From: Stephanie.Beever <Stephanie.Beever@carle.com>
Sent: Wednesday, October 08, 2014 8:11 PM
To: Phyllis M Wise
Cc: James.Leonard
Subject: Re: Progress

That's great news!!!!

Sent from my iPhone

> On Oct 8, 2014, at 7:47 PM, "Phyllis M Wise" [REDACTED] > wrote:
>
> Kennedy is allowing us to discuss the business plan and the MOU at the Health Committee meeting on November 3. We will not be presenting at the full BOT.
>
> Bob told me after the meeting he thought we made real progress.
>
> Step by step...
> Phyllis
>
> Sent from my iPhone

From: Phyllis Wise [REDACTED]
Sent: Thursday, October 09, 2014 5:16 AM
To: James.Leonard
Cc: Stephanie.Beever
Subject: Re: Progress

Jim,

I'll know more for sure after Friday. But I think this means it will go to the full board at the January 15th BOT meeting. Ed McMillan and Tim Koritz may try to get it onto the full board in November, but I was urged not to push Kennedy any further. I'll talk with you at the end of the week.

Phyllis

Sent from my iPad

> On Oct 8, 2014, at 8:25 PM, James.Leonard <James.Leonard@Carle.com> wrote:

>

> Great. Does that mean the project isn't going to the board at all in November? If that is correct what time frame does that put us on?

> Jim

>

> Sent from my iPad

>

>> On Oct 8, 2014, at 20:47, Phyllis M Wise [REDACTED] wrote:

>>

>> Kennedy is allowing us to discuss the business plan and the MOU at the Health Committee meeting on November 3. We will not be presenting at the full BOT.

>>

>> Bob told me after the meeting he thought we made real progress.

>>

>> Step by step...

>> Phyllis

>>

>> Sent from my iPhone

>

From: Normand Paquin [REDACTED]
Sent: Friday, October 10, 2014 7:12 AM
To: Phyllis Wise
Subject: Re: Questions from CK

Just one more:

Provide examples of College P&L. (In my notes I had "College solvency report" and it took me a while to realize what that was).

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Thu, Oct 9, 2014 at 7:05 PM, Normand Paquin <[REDACTED]> wrote:
Phyllis,

These are the points are noted from the discussion. Did I miss any?

What is percentage of in-state students at UIC? Susan Kies: ~70% in-state

Is there a need for an additional 50 doctors in Illinois? Irony here is that Manatt report suggests there definitely is a shortage of physician scientists.

Are the research estimates credible? (quite confident they are low if anything but will dig up data in research-intensive COM).

Can we get P&L from Carle? Steph took note of that today and will share what she can.

Will Carle guarantee their \$100M by putting aside a reserve from their foundation? I am highly reluctant to ask for anything along these lines since Carle has been upset that we have not been willing to back any of our commitments. I do wonder if we might ask Bob if he would be willing to guarantee our fundraising draws if Carle guaranteed its amounts.

Need to clarify Carle contributions to clinical practice. Steph clarified this for me this morning. I was in error. Basically, for the 20% time the faculty are teaching, Carle assumes much of this will be having its doctors teaching students as they deal with real patients - the clinical practice revenues corresponds to the revenues generated during these interactions. Hence the estimates are based on the 20% they will spend with the COM, not the other 80%.

Provide a descriptive chart of accounts and indicate the growth drivers behind the numbers.

Validate that Carle (and potential partners) will be able to take on the extra students. Where can we expect them to go? (To ask Steph to detail out).

List at least six projects with UIC and convey how this is good for UIC.

Indicate why we think the fundraising is realistic.

Do let me know if I missed anything.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Te [REDACTED]

From: Normand Paquin [REDACTED]
Sent: Friday, October 10, 2014 7:20 AM
To: Phyllis Wise
Subject: Re: Questions from CK

Thank you Phyllis.

Item 3 is something Vicky and I can easily handle. But it does remind me that we need to be sure to provide the latest budget to Walt and his team (Mike Bass already has it).

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Fri, Oct 10, 2014 at 7:14 AM, Phyllis Wise [REDACTED]m> wrote:
Normand,

The only additional points that I had written down are:

1. Can Carle absorb the additional 3rd and 4th year students? I assume that Jim/Steph will say yes. They will be hiring more physicians to cover this.
2. Are there residency spaces (presumably at Carle and at other universities) for the additional students. This has been the choke point for the nation in training new physicians. Adding this small number is not going to make any difference. We assume that the kinds of students we will be training will be in great demand.
3. Have Walt look over and provide a "descriptive chart of accounts" and "growth drivers - inflation, students". I am not familiar with these terms, so I don't know what we need to provide.
4. What is the NSF budget with and without counting the Blue Waters. Peter should be able to provide this.

I have already asked Jennifer to provide examples of collaboration. I agree with you about asking Carle for more demonstration that their commitment is rock solid any more than is already in the MOU. We just have to let this go. It will be interesting to see what the other trustees say.

Phyllis

From: Phyllis Wise [REDACTED]
Sent: Friday, October 10, 2014 3:27 PM
To: Lykins, Greg; Meyer, Chris
Cc: Peterson, Dan C; Peter B. Fox; Rick Stephens; James Leonard
Subject: Re: Visit with Chris Kennedy with Jim Leonard

Dear Greg and all,

I wrote an email to Chris Kennedy last night and will forward that to you. Jim - a heads up - I offered that you would be willing to meet with Chris because Steph said in the meeting that you would be willing. I mentioned that you would likely be bringing 1-2 others and mentioned Greg's name, but no one else because I wasn't sure exactly who might be able to go.

Phyllis

On Friday, October 10, 2014 3:03 PM, "Lykins, Greg" <Gregory.Lykins@busey.com> wrote:

Just a thought ...

It would be potentially even more effective (?) if we used the same group as previously met with Bob Easter .. including Peter, Chris, Jim, Rick and Greg ..

GBL

Sent from my iPad

On Oct 9, 2014, at 4:32 PM, "Phyllis Wise" [REDACTED] wrote:

I'd be happy to do that.

Phyllis

Sent from my iPad

On Oct 9, 2014, at 4:09 PM, "Peterson, Dan C" <dcpeters@illinois.edu> wrote:

Phyllis,

I believe you should reach out to CK, perhaps thru Susan, to offer this meeting based on his question about CARLE.

Dan

From: Phyllis M Wise [mailto:[REDACTED]]
Sent: Thursday, October 09, 2014 3:13 PM
To: Peterson, Dan C
Cc: Peter B. Fox; Lykins, Greg
Subject: Re: Visit with Chris Kennedy with Jim Leonard

I agree. Fantastic strategy!

Sent from my iPhone

On Oct 9, 2014, at 12:23 PM, "Peterson, Dan C" <dcpeters@illinois.edu> wrote:

Excellent strategy!

Dan

From: Peter B. Fox [mailto:peterf@fox-companies.com]
Sent: Thursday, October 09, 2014 11:51 AM
To: Lykins, Greg
Cc: ██████████ Peterson, Dan C
Subject: Re: Visit with Chris Kennedy with Jim Leonard

I agree!!

Sent from my iPhone

Peter fox

Peterf@fox-companies.com

On Oct 9, 2014, at 11:44 AM, Lykins, Greg <Gregory.Lykins@busey.com> wrote:

Folks,

If we do try to visit with Chris Kennedy with Jim Leonard .. I think it would be good to possibly include Rick Stephens and me .. with our history with Carle .. Rick's acknowledged significant philanthropy helping others - [REDACTED] .. and our interest in supporting the whole university including Chicago. Rick and I also have a long history in [REDACTED] an organization that Chris belonged to .. Also, we might try to encourage [REDACTED] to join us. The purpose can include giving Chris support for the financial strength and commitment of Carle. Rick and I can support Jim's leadership and credibility .. Just thinking ...

GBL

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From: Phyllis Wise [REDACTED]
Sent: Sunday, October 12, 2014 10:58 AM
To: James. Leonard
Subject: time to talk?

Dear Jim,

I know you have been out of town. I'd like to talk with you today or sometime soon to catch you up on my conversation with Chris Kennedy and a bit of follow-up since then. Let me know a good time, and I will call you. I am free until 3 and then again late this evening. Tomorrow is crazy. But I am free from 12:30-2 on Tuesday and we could talk on the phone or I could come to your office.

Best,
Phyllis

From: White, B Joseph <bjwhite@illinois.edu>
Sent: Sunday, October 12, 2014 12:15 PM
To: Phyllis Wise
Subject: Re: time to continue our conversation?

Hi Phyllis,

Yes, [REDACTED] and I really enjoyed the time with you and Dick. Thank you.

I'm working at my study at home today. [REDACTED] Call any time. If I happen to be up and out, please call me on my mobile: [REDACTED]

BTW, I'm happy not to communicate with Tom if that's preferable. I'm fired up about your COM initiative and would like to help if there's a way.

Best,

Joe

James F. Towey Professor of Business and Leadership
President Emeritus
University of Illinois

On Oct 12, 2014, at 7:49 AM, Phyllis Wise [REDACTED]m> wrote:

Dear Joe,

Dick and I talked through the rest of the evening and yesterday about how much we enjoyed dinner with you and [REDACTED]. Your advice is invaluable because you are a role model of how to lead and how to handle challenges. You really live the principles of "Keep calm and carry on".

I wonder whether we could find a time to talk before you contact Tom Siebel. I want to tell you more about current discussions with him, which I did not go into at dinner, before you have any conversation with him about the College of Medicine. I would like to give you this information before you talk with him and also to seek your advice.

If you give me the phone number that is best to use and give me a few time options, I'll call you. I am relatively free today, if this works for you.

Warm wishes,
Phyllis

From: Phyllis Wise [REDACTED]
Sent: Tuesday, October 14, 2014 1:14 PM
To: Phyllis Wise
Subject: Fw: Carle/UIUC Medical School

On Monday, October 13, 2014 8:12 AM, James. Leonard <James.Leonard@Carle.com> wrote:

Chairman Kennedy,

My name is Dr. Jim Leonard and I am the CEO of Carle Health System in Champaign- Urbana. As you are aware Carle is the major clinical and financial partner in the proposal. I understand from the Chancellor that you have a number of specific questions regarding our obligations and capabilities. I will be happy to meet and address those issues and would hope that we could also touch on the broader and strategic opportunities imbedded in the plan. I have asked that my assistant connect with your Board's secretary to find a date, time and location.

Respectfully,
Jim Leonard

James C. Leonard, MD
President & Chief Executive Officer

We will be a world class innovator providing exceptional patient care and research

From: Normand Paquin [REDACTED]
Sent: Saturday, October 18, 2014 10:13 PM
To: Phyllis Wise
Subject: Regarding your remark

Phyllis,

I'm actually leaning on differentiating between MOU "highlights" and an MOU summary (more comprehensive). Perhaps we can discuss tomorrow at some point.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel [REDACTED] 

From: Phyllis M Wise [REDACTED]
Sent: Sunday, October 19, 2014 1:55 PM
To: McMillan Ed; Wise Phyllis
Cc: Paquin Normand
Subject: Re: Time to review the budget plan

Ed,

Somehow this got sent from my [REDACTED] email. I meant to send it from my Illinois email address, so I am sending it to myself at the right address.

Phyllis

Sent from my iPhone

> On Oct 19, 2014, at 2:45 PM, Phyllis M Wise [REDACTED] > wrote:
>
> Dear Ed,
>
> I hope you had a good week away from the office. Normand and I stand ready to review the budget plan for our COM with you. I am particularly flexible on Tuesday morning before 11:30am. I have copied Normand since I am not sure what his calendar looks like. He will send you all the tables and other information before we talk.
>
> Please let us know when you are free. If Tuesday does not work, we'll find another day.
>
> Best,
> Phyllis
>
> Sent from my iPhone

From: Peter B. Fox <peterf@fox-companies.com>
Sent: Sunday, October 19, 2014 4:33 PM
To: Phyllis M Wise
Cc: Lykins, Greg; Meyer, Chris; Ann.Beyers; Rick Stephens (rick@investres.net)
Subject: Re: Meeting with University of Illinois Trustee Chris Kennedy

I'm flexible. Whatever is best

Sent from my iPhone
Peter fox

Peteerf@fox-companies.com

On Oct 19, 2014, at 4:56 PM, Phyllis M Wise [REDACTED] wrote:

All,

I'll ask Susan Kies whether they can set up a phone in Kennedy's office, if you would like. But I think that just Greg and Jim will be great.

Phyllis

Sent from my iPhone

On Oct 19, 2014, at 2:57 PM, "Peter B. Fox" <peterf@fox-companies.com> wrote:

Whatever is best

Sent from my iPhone
Peter fox

Peteerf@fox-companies.com

On Oct 19, 2014, at 3:52 PM, Lykins, Greg <Gregory.Lykins@busey.com> wrote:

I will be with Jim .. any other ideas who might join us ? .. or is two ok .. with the possibility of Peter on phone enough?

I would suggest Habeeb, but since Habeeb has been Chair of Champaign County Republicans .. that may not be perfect.

GBL

From: Peter B. Fox [peterf@fox-companies.com]
Sent: Thursday, October 16, 2014 7:42 PM
To: Meyer, Chris; Ann.Beyers; 'Rick Stephens (rick@investres.net)'; Lykins, Greg

Cc: 'Phyllis Wise (pmwise@illinois.edu)'
Subject: RE: Meeting with University of Illinois Trustee Chris Kennedy

I will be in nc
I could join by phone?
I don't want to have jim abandoned
I could do oct 22 23 24 or nov 10-15

From: Chris Meyer [<mailto:cmeyer@oktocom.com>]
Sent: Thursday, October 16, 2014 4:56 PM
To: Ann.Beyers; 'Rick Stephens (rick@investres.net)'; 'Lykins, Greg'; Peter B. Fox
Cc: 'Phyllis Wise (pmwise@illinois.edu)'
Subject: Re: Meeting with University of Illinois Trustee Chris Kennedy

Ann, Unfortunately, I will be in London on the 28th. Chris Meyer

From: "Ann.Beyers" <Ann.Beyers@Carle.com>
Date: Thursday, October 16, 2014 at 11:25 AM
To: Chris Meyer <cmeyer@oktocom.com>, Rick Stephens <rick@investres.net>, Greg Lykins <greg.lykins@busey.com>, Peter Fox <peterf@fox-companies.com>
Cc: Phyllis Wise <pmwise@illinois.edu>
Subject: FW: Meeting with University of Illinois Trustee Chris Kennedy

Gentlemen,
You are invited to join Dr. Leonard at his meeting with University of Illinois Board Chairman Chris Kennedy. Please let me know as soon as possible if you are available. If so, please also send the requested bios.

Best,
Ann

Ann Beyers, CAP-OM | Assistant to the President
Executive Assistant to EVP Chief Legal and Human Resources Officer
The Carle Foundation | Administration
☎ 217-383-3221 | ☎ 217-326-0300
✉ ann.beyers@carle.org | carle.org

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From: Foran, Ellen [<mailto:cforan@uillinois.edu>]
Sent: Wednesday, October 15, 2014 5:07 PM

To: Ann.Beyers
Subject: Meeting with University of Illinois Trustee Chris Kennedy

Hi Ann,

I am writing to confirm the arrangements we made today for Dr. Leonard to meet with the University of Illinois Board Chairman Chris Kennedy.

The meeting will be on Wednesday, October 29, 2014, at 10:30 a.m.

Here are directions that Dr. Leonard will need to find Mr. Kennedy's office: Chris' office is at The Merchandise Mart at 222 Merchandise Mart Plaza. As his office is inaccessible to the public, please proceed to the second floor of the building, and at the east end of the building on the second floor you will find the food court and the CTA "L" stop. Across from them is an Au Bon Pain café. Please call Ike at (312) 527-7503 from out in front of the Au Bon Pain, and he will meet you to bring you back to the office.

If you could, I would like to share a bio of Dr. Leonard with Mr. Kennedy prior to this meeting. Would you have one that I could share?

And will Dr. Leonard have anyone else with him for this meeting? If so, could you share their names bios for them too?

Please let me know if you or Dr. Leonard have questions or concerns about this meeting.

Thank you for working through scheduling this meeting. Mr. Kennedy and Dr. Leonard are both very busy people!

Ellen

C. Ellen Foran
Assistant Secretary
Board of Trustees
352 Henry Administration Building, mc-350
506 South Wright Street
Urbana, IL 61801
217-333-1921

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From: Phyllis Wise [REDACTED]
Sent: Monday, October 20, 2014 12:10 PM
To: Normand Paquin
Subject: Re: Should be OK on MOU

thank you!

On Monday, October 20, 2014 10:29 AM, Normand Paquin <[REDACTED]> wrote:

Spoke to Steph. She thinks the change should be fine. She will get back to me later.

She is anxious that the MOU be considered final ASAP.

I did tell her I was hoping to meet with Prof. Bill Maher this week but with the confidence that our Faculty executive Committee members that have been engaged in this effort are confident MOU is consistent with University Statutes.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED]

From: Ilesanmi Adesid [REDACTED]
Sent: Tuesday, October 21, 2014 8:37 PM
To: Phyllis Wise
Subject: Resolution
Attachments: SCAN0001.PDF

Phyllis,

This is the resolution. Please keep this to yourself. You may want to talk to Susan Keis about the resolution and see whether they can change some of the language.

Ade

From: Phyllis M Wise [REDACTED]
Sent: Wednesday, October 22, 2014 11:30 AM
To: Normand Paquin
Cc: Adesida, Ilesanmi
Subject: Re: MOU next steps

Please do. I have not contacted him yet.

Sent from my iPhone

On Oct 22, 2014, at 9:52 AM, Normand Paquin <[REDACTED]> wrote:

Thank you,

On a different note, is it OK for me to contact Walt Knorr and refer to our meeting with Ed in requesting his projections on the benefits issue?

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Wed, Oct 22, 2014 at 9:49 AM, Phyllis Wise <[REDACTED]> wrote:
Normand,

I really don't know the answers to your questions. This will require Walt Knorr's signature on behalf of the BOT. But I don't know whether he will be willing to sign. Let me check with him.

Phyllis

On Wednesday, October 22, 2014 8:52 AM, Normand Paquin
[REDACTED] wrote:

Phyllis, Ade,

Can I ask you to give some thought as to what are the next steps with the MOU?

In particular,

1) Carle hopes that we can view it as final at this point. In this regard, I'm pleased to say that guidance I got from Roy Campbell suggests that we don't need to give Bill Maher opportunity to change the MOU.

2) When would we proceed to request the MOU be signed? Steph has indicated there is some reluctance to begin work on the Definitive Agreements before the MOU has been signed. So what is the best thing to do here?

- a) Do we get the MOU into the process? Is that by going through OSPRA?
- b) Do we need to wait until after Nov. 3rd? Or after the Nov. 13 BOT meeting?
- c) Do we need to wait until after the Nov. 17 when we hope the faculty Senate will pass its resolution to move forward?

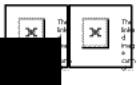
I think it is possible that we can do some ground work towards the Definitive Agreements as long as Carle is convinced that we have a plan for getting the MOU signed.

Please give this some thought and consult as appropriate but I think I need to give Carle some indication this week as to what we are thinking about.

Thank you, Normand

Dr. Normand Paquin
Skype: normand_paquin

Te [REDACTED]



From: Normand Paquin [REDACTED]
Sent: Wednesday, October 22, 2014 2:36 PM
To: Phyllis Wise
Subject: Observation
Attachments: Medicine Tuition Rates Summary.docx

Phyllis,

When I came up with suggestions on appropriate tuition rates, I had taken some tuition rated from other schools and applied an inflation factor to see what they might be in the fall of 2017. The group had raised the figure in recognition of the added value of this special degree.

As a result of Ed's questioning yesterday, I looked at the budget details and found that the tuition rates had been viewed by the budget group as Year 1 (2015) rates. They applied a 2% annual inflation factor twice in calculating the 2017 (Year 3) rate. Its' not a big difference but we need to be aware of that.

To refresh your memory, I attach tuition data gathered from other Colleges of Medicines.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel [REDACTED] 

Institution	Year	Out-of-state	In-state	Other fees of note
U. of Washington	2013-14	Yrs. 1-2: \$59,175 Yrs. 3-4: \$78,203	Yrs. 1-2: \$30,186 Yrs. 3-4: \$39,267	
UCLA	2014-2015	\$47,802	\$35,557	
UCSD	2013-2014 Spring semester	\$15,936	\$11,854	
U of Michigan	2014-2015	M1-M2: \$49,215 M3-M4: \$48,772	M1-M2: \$30,899 M3-M4: \$30,590	
U of Wisc	2013-2014	\$37,060	\$27,164	
UNC-Chapel Hill	2014-2015	\$48,232	\$21,354	
UVA	2014-2015	Yrs. 1-2: \$57,726 Yr. 3: \$57,326 Yr. 4: \$57,076	Yrs. 1-2: \$47,118 Yr. 3: \$46,718 Yr. 4: \$46,468	
UT-Austin		NA	NA	

From: Phyllis Wise [REDACTED]
Sent: Friday, October 24, 2014 10:04 PM
To: James.Leonard
Cc: Lykins, Greg
Subject: Re: A question ..

Greg and Jim,

Let me check with Ade about how he feels about Andreas joining you. Andreas is certainly impressive and could carry the message with you very well. I don't know whether it would be more effective to have non-university people arguing for the COM(I.e. our partner and a highly respected community leader) without one of us. Ade will provide good advice. I would also need to check with Andreas to see whether he is free on October 29.

Thanks for the suggestion.

Phyllis

Sent from my iPad

> On Oct 24, 2014, at 10:02 AM, James.Leonard <James.Leonard@Carle.com> wrote:

>

> i will leave the decision to those of you who know the parties better.

> jcl

>

> Sent from my iPad

>

>> On Oct 24, 2014, at 09:46, Lykins, Greg <Gregory.Lykins@busey.com> wrote:

>>

>> Hi Phyllis and Jim,

>>

>> I had a brief conference call with Peter Fox and Rick Stephens this morning bringing them up to date on our process. During that call Rick suggested that perhaps we could have Andreas Cangellaris join us to express how important the medical school idea is to the future of the Engineering College. That sounded like a good idea to us .. in that we would then represent Carle, the Community and Engineering .. However, you folks know best .. and there could be political ramifications of that idea.

>>

>> What do you think?

>>

>> Greg

>>

>> Sent from my iPad

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>

From: Phyllis Wise [REDACTED]
Sent: Friday, October 24, 2014 10:11 PM
To: Lykins, Greg; James Leonard; rick@investres.net; 'Peter B. Fox'
Subject: Re: Reporting in ..

Dear Greg,

It sounds like you had a very fine conversation. I hope that Jim Roth understands that all of the financials are in place except the philanthropy (\$135M over 8 years). We raised \$182M in cash during the last fiscal year. So \$135M should be doable. Obviously we are aiming for a higher amount to insure that we can do this in the manner that we intend to. But \$135M is sufficient to make the budget balance.

Phyllis

On Friday, October 24, 2014 10:47 AM, "Lykins, Greg" <Gregory.Lykins@busey.com> wrote:

Hi Folks,

Just reporting in. I had a very pleasant talk with Jim Roth and Avijit. Jim was forthcoming that his charge is effectively how to frame the issue .. and to "assure that the chances for success for the medical school will extremely high". He seemed to concur with our arguments and reflections .. but of course, is trying to articulate a position that all will be satisfied.

Thinking about the conversation .. brings me to some concern of a comment he made about "taking the time to assure this plan is financially viable". I wonder if his recommendation would entail some sort of recommendation to do so .. I indicated our thought that "time is of the essence" for all sorts of reasons. He also seemed to concur with this as well from his perspective of consulting with many research institutions.

Avijit didn't say much .. but what he did say seemed supportive.

Not anything particularly new .. Let me know if you have any questions.

Thanks,

Greg

Gregory B. Lykins
Chairman of the Board
First Busey Corporation
100 W. University Ave.
Champaign, IL 61820
P: 217.351.6535 | Ext:56535
C: [REDACTED]
F: 217.351.6651

Busey

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From: Peter B. Fox <peterf@fox-companies.com>
Sent: Saturday, October 25, 2014 10:28 AM
To: Phyllis Wise
Cc: Greg Lykins; James. Leonard; Ilesanmi Adesida
Subject: Re: A question ..

I am available

Sent from my iPhone
Peter fox

Peterf@fox-companies.com

On Oct 25, 2014, at 9:39 AM, Phyllis Wise <[REDACTED]> wrote:

Greg, Jim, and I am adding Peter,

I am forwarding Ade's email so that you can read it in its entirety. I think his advice is wise. If Peter is really available, I am happy to contact Chris Kennedy's assistant, Ike, and ask whether a phone can be hooked up into his office to allow Peter to participate.

Thanks so much for taking the time to have this meeting with Kennedy. I am sure it will be immensely helpful.
Phyllis

On Saturday, October 25, 2014 4:23 AM, Ilesanmi Adesida <[REDACTED]> wrote:

Phyllis,

I will not encourage it. Politically, Chris will believe that we planted this if Andreas were present and may feel constrained in his deliberations. I believe that Greg and Peter can make the case especially with Peter being a tech investor. He can stress the importance of the preeminence COE to the DMDI, 1871, IMD and tech in Chicago as well as to the Research Park and economic development here in Central Illinois. Chris has heard all these from us, we should let the community now help us make the case. Jim will of course make the case for the benefits to Carle and for engineering in health care advances and impact on cost and for under served.

Ade

On Friday, October 24, 2014, Phyllis Wise <[REDACTED]> wrote:
Ade,

What do you think about asking Andreas to join Greg and Jim to visit with Chris Kennedy on October 29?

Phyllis

On Friday, October 24, 2014 10:02 AM, James. Leonard
<James.Leonard@Carle.com> wrote:

i will leave the decision to those of you who know the parties better.

jcl

Sent from my iPad

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From: Peter B. Fox <peterf@fox-companies.com>
Sent: Monday, October 27, 2014 8:19 AM
To: Ilesanmi Adesida
Subject: RE: A question ..

Let me know how I can help

From: Ilesanmi Adesida [mailto:
Sent: Monday, October 27, 2014 12:01 AM
To: Peter B. Fox
Subject: Re: A question ..

Thanks, Peter, for all your support.
Ade

On Sun, Oct 26, 2014 at 4:34 PM, Peter B. Fox <peterf@fox-companies.com> wrote:

I agree. I would be happy to go and see in a week or so

Sent from my iPhone
Peter fox

Peterf@fox-companies.com

On Oct 26, 2014, at 5:30 PM, Phyllis M Wise [REDACTED] wrote:

Jim, Peter and Greg,

Ok. It would be great if Greg and Jim let you, Peter, know if you need to follow up with any further conversation. For now it sounds that it is best to have Jim and Greg carry the message.

Thanks again for all the time you have put into this.

Phyllis

Sent from my iPhone

On Oct 26, 2014, at 3:56 PM, "Peter B. Fox" <peterf@fox-companies.com> wrote:

I agree. Better to be face to face.

Sent from my iPhone
Peter fox

Peterf@fox-companies.com

On Oct 26, 2014, at 2:56 PM, James.Leonard <James.Leonard@Carle.com> wrote:

Seems to me that if he is not going to participate in person that either a limited time for him to input or skip it since it will add a dimension that may make the chair cautious. I would prefer to be able to try and read the environment and react accordingly and that is hard to do with someone not in the room.

I will bow to the will of the group.

Jim

Sent from my iPad

On Oct 25, 2014, at 08:39, Phyllis Wise

[REDACTED] > wrote:

Greg, Jim, and I am adding Peter,

I am forwarding Ade's email so that you can read it in its entirety. I think his advice is wise. If Peter is really available, I am happy to contact Chris Kennedy's assistant, Ike, and ask whether a phone can be hooked up into his office to allow Peter to participate.

Thanks so much for taking the time to have this meeting with Kennedy. I am sure it will be immensely helpful.

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<http://www.busey.com>.

From: Joyce Tolliver
Sent: Tuesday, October 28, 2014 3:27 PM
To: Joyce Tolliver
Subject: draft
Attachments: CoM res draftJT.docx

--

Joyce Tolliver

From: Peter B. Fox <peterf@fox-companies.com>
Sent: Wednesday, October 29, 2014 4:35 PM
To: Lykins, Greg
Cc: Phyllis Wise; James. Leonard; Rick Stephens (rick@investres.net); Meyer, Chris; Habeeb Habeeb (habeeb@bpcinc.com)
Subject: RE: Chairman Kennedy- confidential

I understand

From: Lykins, Greg [mailto:Gregory.Lykins@busey.com]
Sent: Wednesday, October 29, 2014 4:35 PM
To: Peter B. Fox
Cc: Phyllis Wise; James. Leonard; Rick Stephens (rick@investres.net); Meyer, Chris; Habeeb Habeeb (habeeb@bpcinc.com)
Subject: Re: Chairman Kennedy- confidential

Best discussed verbally ...

Sent from my iPad

On Oct 29, 2014, at 4:28 PM, "Peter B. Fox" <peterf@fox-companies.com> wrote:

Seems like a slow road to??

From: Lykins, Greg [mailto:Gregory.Lykins@busey.com]
Sent: Wednesday, October 29, 2014 4:26 PM
To: Phyllis Wise
Cc: James. Leonard; Peter B. Fox; Rick Stephens (rick@investres.net); Meyer, Chris; Habeeb Habeeb (habeeb@bpcinc.com)
Subject: Re: Chairman Kennedy- confidential

Jim's summary is accurate .. Just to reinforce .. We believe that Chris is not opposed to the medical school concept but desires to understand the specific issues that give rise to particular groups' objections and the pragmatics of the potential political ramifications. It was a very transparent visit .. Greg

Sent from my iPad

On Oct 29, 2014, at 4:11 PM, "Phyllis Wise" [REDACTED] wrote:

Dear Jim and Greg,

Thank you for the summary of your meeting. I continue to hope that we will be able to proceed. It will be a question of whether the resolution will allow us to have the university evaluate and sign the MOU, which will allow us to begin to write the definitive agreement.

A great deal will depend on the election.

Thanks again for taking the time. I cannot help to believe that he must be impressed with Carle, your leadership, the community leadership that Greg represents.

Best wishes,
Phyllis

On Wednesday, October 29, 2014 3:46 PM, James. Leonard
<James.Leonard@Carle.com> wrote:

Summary:

Greg and I met with the chairman today in Chicago. This was the first time I had met him. Greg and I debriefed after the meeting so I could send this summary. The meeting lasted a little over an hour. He was very forthcoming and open in his comments.

He is not opposed to the project but has expectations as Board Chair about process and the template that he wants the board to use as a governance body. Specific to COM-He wants to see a broader business plan for the university and a subset of that plan would be how this COM would fit. He has an expectation that internal opponents of this or any project will be specific about their concerns and not just general as they have been to date. What he described is a business plan that notes the support and objections (if any) of each campus and that interfaces with a broader university plan. It was not specifically stated but implied that this would come from the President's office.

I anticipate that based on his focus that the project will be delayed beyond this November meeting which is consistent with the last resolution that I saw and that he will charge administration to develop a recommendation.

We did present the Carle story and our level of support and expertise – he took notes, asked some general questions, and was attentive and engaged throughout.
Jim

James C. Leonard, MD
President & Chief Executive Officer

<image001.png>We will be a world class innovator providing exceptional patient care and research

<image001.png>

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From: Phyllis M Wise [REDACTED]
Sent: Wednesday, October 29, 2014 6:15 PM
To: Lykins, Greg
Subject: Re: Chairman Kennedy- confidential

I'll call if I get done with this dinner at a decent hour.

Sent from my iPhone

On Oct 29, 2014, at 5:34 PM, "Lykins, Greg" <Gregory.Lykins@busey.com> wrote:

Best discussed verbally ...

Sent from my iPad

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Greg and I met with the chairman today in Chicago. This was the first time I had met him. Greg and I debriefed after the meeting so I could send this summary.

The meeting lasted a little over an hour. He was very forthcoming and open in his comments.

He is not opposed to the project but has expectations as Board Chair about process and the template that he wants the board to use as a governance body. Specific to COM-He wants to see a broader business plan for the university and a subset of that plan would be how this COM would fit. He has an expectation that internal opponents of this or any project will be specific about their concerns and not just general as they have been to date. What he described is a business plan that notes the support and objections (if any) of each campus and that interfaces with a broader university plan. It was not specifically stated but implied that this would come from the President's office.

I anticipate that based on his focus that the project will be delayed beyond this November meeting which is consistent with the last resolution that I saw and that he will charge administration to develop a recommendation.

We did present the Carle story and our level of support and expertise – he took notes, asked some general questions, and was attentive and engaged throughout.

Jim

James C. Leonard, MD
President & Chief Executive Officer

<image001.png>We will be a world class innovator providing exceptional patient care and research

<image001.png>

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From: Phyllis M Wise [REDACTED]
Sent: Wednesday, October 29, 2014 7:08 PM
To: Normand Paquin
Subject: Re: Thoughts

I'm at a dinner right now. Will call if it is over before too long.

Sent from my iPhone

On Oct 29, 2014, at 7:48 PM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

One thought would be to call Jim to find out how his meeting with CK went today.

Perhaps that might impact whether to add the MOU statement I suggested this morning.

Discussions with budget people proving to be difficult. Not sure what best steps are. Adam carved out 30 mins for us to talk tomorrow. Happy to discuss this evening if you decide to call.

Normand

From: Phyllis Wise [REDACTED]
Sent: Thursday, October 30, 2014 5:55 AM
To: Normand Paquin
Subject: Re: insight on thinking from budget folks

Geez...All of the concerns can be addressed. Don't have time to go item by item, but we can talk about it today.

On Wednesday, October 29, 2014 10:12 PM, Normand Paquin [REDACTED] > wrote:

Phyllis,

To add to discussion this evening, copying text that was sent to us after Vicky, Molly, and I met with Nolan Miller and Mike Sandretto.

Normand

--

Mike,

Please see the letter below dealing with the lack of attention to risk management in the BP and feasibility study. I suspect you agree with much of it. I wanted to run it by you first. I believe we should send it to Normand and Vicky before our meeting today. If you agree with it, we should possibly send it to Roy as well to give him a sense of where we're heading. I only had about 20 minutes to write it, so excuse any lack of eloquence. I need to teach in a few minutes and I wanted to get this out in time for them to review before our meeting. Hopefully, they can provide a response, at least in principle.

If you would like to edit it and send it as a joint letter, I'm happy to go that route as well. I don't want to present it as the opinion of the whole SBC, though, obviously.

Best,

nm

In my opinion, the fundamental issue with the business plan as it now stands is that there is almost no attention paid to risk management. The only risk that the consultants identify in either the feasibility study or the business plan is the risk of not moving fast enough. There is some sensitivity analysis on page 85 of the business plan, but it is not explained anywhere in the business plan that I could find. Interestingly, it shows cumulative losses over the planning horizon of between \$62M and \$100M. (In my opinion, someone should be prepared to explain these numbers, as well as the \$80M cumulative loss in the baseline case.)

Broadly speaking, the major revenue streams for the COM include tuition and fees, research grants, clinical practice revenue and fundraising. The numbers in the financials are point estimates. Actually numbers could be higher or lower. In particular, there is significant likelihood that tuition revenue and fundraising revenue could fall below these targets. In the case of tuition revenue, there is significant uncertainty about whether

we will be able to attract enough students at the proposed tuition rates. In the case of fundraising, the fundraising targets are extremely ambitious. Fundraising must come from either existing sources (e.g., donors to other colleges) or new sources. If the former, have we accounted for cannibalization? If the latter, how certain are we of our ability to raise funds from donors who have never given to the university before? The contribution of fundraising to revenues depends on earning a return of 5.5%. What happens if returns on investments are lower?

In the case of research grants, the primary source of grants is likely to be NIH. In recent years, NIH funding has been cut. What happens if there are further cuts to NIH funding in the future? What happens if we are not as successful in getting grants as we had hoped?

For clinical practice, presumably Carle has reasonably good information. Of the revenue sources, I have the most confidence in the clinical practice revenue. But, Carle is a major provider of health benefits to state employees. What happens if Health Alliance gets left out of the state insurance options again?

In short, there is a non-zero, possibly significant chance that revenues will fall significantly below projections.

On the cost side, there are also risks. Here, however, we at least have information on relevant costs from the college of engineering to go by. Given what we know about financial management at the university (e.g., Uni High), there are questions about how accurate our cost numbers are. But, I believe the risk here is less than in the case of, say, fundraising.

One of the main features of the cost side of the equation is that we are making long-term commitments to hire faculty and staff. In particular, the salaries of tenured faculty must be paid for the foreseeable future. These are costs that will be difficult to avoid.

In short, we face significant risk on the revenue side, and expenses that are difficult to avoid. This raises the question of what we will do in the case where revenues are not large enough to support the activities of the COM. Where is the money going to come from? Since we can't avoid the costs, it is going to have to come from somewhere.

The charge to the SBC asks us to weigh in on three questions:

- 1) Is the attached Business Plan thorough in identifying projected expense items and potential sources of revenue for the proposed new College of Medicine?
- 2) Is the financial plan consistent with commitments made to (i) not request any new General Revenue Funds be directed to the operation of the new College of Medicine, and (ii) not require the diversion of resources from other colleges?
- 3) Understanding that a final budget will be developed by the founding dean of the college and the initial college faculty and understanding that this budget will be subject to appropriate reviews at that time, does the financial plan provide for reasonable and sufficient revenues and investments to address the expenses that can be anticipated for the College?

With respect to (1), I am inclined to answer that the Plan does a reasonably thorough job of identifying expense items and potential revenue sources in the sense that it lists them. The particular estimates that are used deserve more scrutiny and justification, but they are probably reasonably good estimates of averages, given that we are operating in "unknown territory." However, there is significant risk that financial

performance will fall short of expectations, and the BP does not sufficiently address how these risks will be managed should they arise.

With respect to (2i). The “plan” is consistent with these commitments. However, it is unclear how credible we can be on this point. If the COM is successful, the state may respond by reducing GRF in other areas (similar to the clawbacks of cash balances that have occurred at other institutions). This is a potential risk.

With respect to (2ii), while the plan as written does not take resources from other colleges, the plan as written does not address what will happen if revenue falls short of projections. In this case, unavoidable costs will have to be paid, and this money is going to have to come from somewhere. I don’t see how this cannot involve the diversion of resources from other parts of the campus.

With respect to (3), while the BP, on average, seems reasonable, it does not provide sufficient discussion of risk management in the event that revenues fall short of projections or costs exceed projections.

I want to be clear that, while I believe the BP does not contain sufficient attention to risk management in its current form, that should not be interpreted as saying I do not believe there is any way to manage the risks associated with this venture. I am broadly supportive of the idea of a COM on this campus. However, we need to do it with our eyes open, and with real plans in place for what we will do if financial performance is below expectations. Formulating such plans early on in the planning process will contribute to the overall likelihood of success of the COM, which is what we are all ultimately after.

Sincerely,

Nolan Miller

Dr. Normand Paquin
Skype: normand_paquin
Tel: +1-217-819-8964 

From: Phyllis Wise [REDACTED]
Sent: Thursday, October 30, 2014 2:20 PM
To: Wise Phyllis
Subject: Fwd: insight on thinking from budget folks

Sent from my iPad

Begin forwarded message:

From: Normand Paquin <[REDACTED]>
Date: October 29, 2014 at 10:11:28 PM CDT
To: Phyllis Wise [REDACTED]
Subject: insight on thinking from budget folks

Phyllis,

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Normand

--

Mike,

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Sincerely,

Nolan Miller

Dr. Normand Paquin
Skype: normand_paquin
Tel: +1-217-819-8964 

From: Phyllis Wise [REDACTED]
Sent: Saturday, November 01, 2014 5:09 PM
To: Normand Paquin
Subject: Re: Budget questions

Normand,

All the clinical revenue stuff is too complicated for my small brain...I hope they won't go into this level of questioning.

Of course you can jump in and add to the discussion at the meeting whenever you want to.

thanks for this and all of the other changes you suggested in your other emails.

Phyllis

On Saturday, November 1, 2014 12:48 PM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

The tuition for the 2017 is in fact $45,000 * (1.02)^2$ or \$46,818 for in-state.

For our of state it is \$62,424.

People, I must say, have not harped on this point too much but of course it looked like Ed McMillan had noticed.

The budget applies the inflation factor from next year, year 1 in the budget.

For the clinical revenue: lines 76 to 83 of the long operating statement are key.

The budget starts with the following assumptions:

Clinical faculty will spend 20% teaching, 20% on research, and 60% on clinical service.

Science faculty will spend 60% teaching [really should be 50%], 20% research [really should be 30%] and 20% clinical [not sure how that was arrived at].

The clinical revenue is then computed from the following:

Clinical Practice Gross Charges/Faculty Member on 100% basis is \$1,151,866

The net collection rate from this amount is (27.2%-6.5%)

SO the clinical practice revenue/faculty member on a 100% basis is \$238,436.

Thus,

the practice revenue that goes to the college for clinical faculty is $60\% * \$238,436$.
and

the practice revenue that goes to the college for science faculty is $20\% * \$238,436$.
All adjusted for 2% inflation each year.

So Carle gives us the NET clinical revenue for faculty time on clinical practice. So they are not absorbing the cost of the salaries as well.

Some additional points to note:

1) We did not give campus 5% of the tuition as called for a professional degree. I did not know about this until Mike Sandretto pointed it out.

2) Our budget also does not take out 8% of the ICR for UA in years 0-6 but that is a non-factor in that we used an effective overhead rate of only 25% when the UIC effective rate is 28.8%. Removing 8% from 28.8% gives you 26.5% - our 25% rate is thus still conservative and understates our net revenues.

Of course, I will be there to support you. Can I simply jump in to help you respond to a questions?

Normand

Dr. Normand Paquin

Skype: normand_paquin

Tel [REDACTED]



From: on behalf of [REDACTED]
Sent: Monday, November 03, 2014 7:11 PM
To: Phyllis Wise
Subject: Re: Resolution

That's interesting to know. Thanks.

With that said, would it be appropriate for me to try to set up editorial board meetings for you with the Trib and/or Crain's for next Monday since you're in Chicago? I don't want to put you in a position where you are proactively speaking about the College of Medicine before the Board meeting, unless that's allowed.

Hope you get some rest at some point today.

You are a trooper.

r

----- Original Message -----

From: "Phyllis Wise" <[REDACTED]>
To: "Normand Paquin" <[REDACTED]>, "Kaler Robin" <[REDACTED]>, "Adesida Ilesanmi" <[REDACTED]>, "Burbules Nick" <[REDACTED]>

Sent: Monday, November 3, 2014 5:00:21 PM GMT -06:00 US/Canada Central
Subject: Resolution

All,

Susan Kies texted me that CK made the changes to the resolution 5 minutes before the board meeting started; bless his heart. Probably not for the general public to know.

Phyllis

Sent from my iPad

From: [REDACTED] on behalf of [REDACTED]
Sent: Tuesday, November 04, 2014 1:51 PM
To: Phyllis Wise
Subject: Re: Did you send me an email

Of course!

----- Original Message -----

From: "Phyllis Wise"
To: [REDACTED]
Sent: Tuesday, November 4, 2014 1:41:30 PM GMT -06:00 US/Canada Central
Subject: Re: Did you send me an email

thanks for sending the Trib article in my other email.

On Tuesday, November 4, 2014 10:36 AM, [REDACTED] wrote:

That was my concern too.

We'll hold off.

----- Original Message -----

From: "Phyllis Wise" <[REDACTED]>
To: "Robin Kaler" <[REDACTED]>
Sent: Tuesday, November 4, 2014 8:02:31 AM GMT -06:00 US/Canada Central
Subject: Re: Did you send me an email

Robin,

I don't think it is appropriate to talk with the press now. The BOT and Bob were decidedly non-committal. CK putting all those things into the resolution makes me think that all of them are going to make any decision get delayed for a long

time. We will fight it. But I don't know how successful we will be. It's too early to be talking to the press. Greg Lykins sent me an email with a Trib article but I cannot open it so I don't know what it says. A lot depends on the election and the new prez...

Phyllis

On Tuesday, November 4, 2014 6:40 AM, Robin Kaler <[REDACTED]> wrote:

I think I texted. Would you feel comfortable doing editorial board visits Monday with either Crain's or the Trib or both?

Would that cause problems with the Board if you speak to media proactively about the med school before they meet?

Sent from my iPhone

> On Nov 4, 2014, at 1:58 AM, Phyllis M Wise <[REDACTED]> wrote:

>

> About talking to Crains? I thought I saw an email earlier today but can't find it.

>

>

>

> Sent from my iPhone

From: Campbell, R H
Sent: Tuesday, November 04, 2014 3:21 PM
To: Joyce Tolliver
Subject: FW: Commentary on proposed UI-Carle Medical Center partnership
Attachments: Carle letter to editor Nov 2 2014.doc

FYI
Roy Campbell
Sohaib and Sara Abbasi Professor of Computer Science
Siebel Center
201 N Goodwin Av, Urbana, IL 61801-2302
Tel 217-333-0215 Email rhc@illinois.edu

From: Martha Weinberg <[REDACTED]>
Date: Tuesday, November 4, 2014 at 2:05 PM
To: Roy Campbell <rhc@illinois.edu>, Gay Miller <gymiller@illinois.edu>
Cc: "Weinberg, Martha Wagner" <mww@illinois.edu>, 'Martha Weinberg' <[REDACTED]>
Subject: Commentary on proposed UI-Carle Medical Center partnership

Dear Professors Campbell and Miller,

I am writing to you in your capacities as Chair of the Senate Executive Committee and Chair of the Educational Policy Committee at the suggestion of several of my Urbana neighbors who are also senior faculty members at Illinois and who are concerned about UIUC's proposed partnership with Carle Medical Center. When I consulted several of them about an op-ed piece (attached) I have prepared for submission to several newspapers, they told me that the Faculty Senate will be discussing the proposal for a Medical School on November 17th and urged me to send my letter on to you and your committees in the chance that it has not been published by that time.

I consider myself well-qualified to suggest that Illinois should not settle for a partnership with any medical center that is anything less than first rate. First, two generations of my family have lived in Urbana and, with great pride, have been associated with the University for more than 50 years. While I lived in Boston, I served as Vice President for Project Management of Partners Healthcare System, the "parent" of Massachusetts General Hospital and Brigham and Women's Hospital, and the largest employer in Massachusetts. As the principal and manager of my own consulting firm, I provide strategic planning advice to very large non-profit organizations which include universities and academic medical centers such as MIT, Tufts University and the Beth Israel/Deaconess Medical Center in Boston. I have also worked at the University of Illinois and, in 2005, as Visiting Associate Chancellor, coordinated the first-ever strategic planning process for the UIUC campus. I have also taught at MIT, Harvard Business School and Brown University and am familiar with the importance of "shared governance" between faculty and administrators in deciding future directions and priorities. It is for this reason that I write to you and your committees to suggest that Carle Medical Center may fall short as the best possible partner in undertaking one of Illinois' major initiatives, one that will shape the University's prospects for years to come.

As you will see, my major argument in the piece I have attached is that Carle, unlike most great medical centers in this country, has been a very poor partner to its home community of Urbana and has provided minimal support for city services, parks, libraries and schools which are so important in fostering and maintaining a healthy community. Not only does this violate the spirit of the University's Land Grant mission of public engagement and cooperative partnership with the citizens of Illinois, but it also puts the University at a huge competitive disadvantage in attracting national and international talent who want to live and work in Carle's and the University's hometown and who will be drawn to Urbana by great schools, parks, libraries, public services and neighborhoods. As you will see from my article, many great medical centers around the United States have already recognized how important it is to establish, support and maintain strong partnerships with their home communities. The University of Illinois prides itself on articulating and maintaining high standards to encourage diversity in management, to enhance its broad reach to and public engagement with all of its publics, and to support the citizenry its serves. Carle Medical Center has not lived up to these standards.

Also, as a professional whose work in strategic planning and development of initiatives designed to position entities favorably against their competition, I am very surprised that a great University like Illinois would consider partnering on one of its most important initiatives with a medical center that is anything less than renowned as first rate in its research, education and delivery of care. Carle is ranked by US News and World Report only 14th among medical centers in Illinois and not even mentioned on the "Honor Roll" of best hospitals in the country, entities with which it will be competing for funding and patients. Though one of the rationales for establishing a medical school at Illinois is to boost Illinois into the star rankings among universities receiving NIH funding, it is hard to imagine how this partnership with Carle Hospital will boost the University of Illinois (the whole University, not just the Urbana campus) from its current ranking as 38th among recipients of NIH funding to the top of the list. Especially in times of a shrinking NIH budget which tends to favor already-well-established and already very competitive institutions, it is hard to imagine Carle Hospital as able to attract the number of talented physician/researchers it would take to move the needle dramatically on NIH funding and/or to attract the top candidates for medical school in the country.

I have followed closely both the proposals and justifications for the new medical school, and though I have heard much discussion of the strength of Illinois' bioengineering excellence, have seen and heard little mention of Carle's strength as a first rate partner. I hope that as the faculty and administration continue their discussions and deliberations, there will also be a considered discussion of Carle's unique qualifications and, also, of its shortcomings as a community partner and as a source of competitive advantage. It is in the spirit of fostering this discussion that I have written you. Please let me know if I can provide further information about what I have written or aid in advancing your discussions.

Sincerely,

Martha Wagner Weinberg, Ph.D
[REDACTED]

Great Medical Centers Support Their Communities

Martha Wagner Weinberg

It is with great interest that I have read the proposal for a new College of Medicine at UIUC, designed to be a partnership between the University and Carle Medical Center. Though analysts may disagree about many of the suggestions in the proposal (such as the assumption that this partnership will increase the future ability of the University to compete for scarce NIH dollars), I think everyone agrees that a great University like Illinois should not settle for a partnership with a medical center that is anything less than first rate. Carle Medical Center does not fall in this category and comes up especially short in supporting its hometown of Urbana.

Ranked by US News and World Report only 14th among medical centers in Illinois, and not even mentioned on the “Honor Roll” of best hospitals in the country, when compared with the national medical centers with which it will be competing for funding and patients, it falls woefully short in its contributions to the fiscal health of its home community. Carle Medical Center currently uses its self-determined amount of charity care delivered to patients from more than 40 counties in two states as an excuse to avoid paying its fair share of Urbana property taxes, and, as a result, in this year alone Urbana residents have been hit with a 10-11% increase in property taxes.

Great medical centers around the US do not use “charity care” as an excuse to refuse to make tax payments in lieu of taxes, known as “PILOTs.” For example, all major medical centers in Boston and Cambridge, MA., including all Harvard teaching hospitals, supplement “charity care” with generous PILOTs and millions of dollars in “community benefits” programs and services. During the last decade, at least 218 localities in 28 states have received PILOTs from medical centers and universities. PILOTs are common in small and large communities alike, including areas of comparable size to Urbana where non-profit medical centers are major employers and major property owners. For example, the University of Iowa Medical Center pays Iowa City and Coralville \$2.76 million each year. Dartmouth Mary Hitchcock Medical Center has a 20 year PILOT agreement with Lebanon, NH and Lancaster County (PA’s) General Healthcare System (the County’s largest employer) makes a \$1.6 million PILOT in addition to paying taxes on many of its properties. Lancaster’s CEO has described the importance of these payments to building “a healthy community” and has described Lancaster as “fortunate that our financial performance enables us to support local governments and school districts.”

The financial plan for the new Medical School is based on the hugely-profitable Carle Medical Center’s willingness to provide \$100 million over 10 years to support and grow the Medical School, a plan that Carle’s CEO James Leonard describes as a “good investment.” But, unlike the leaders of its national competitors, the top management of Carle has steadfastly refused to make the equally important investment in schools, parks and public services in its (and the University’s) hometown of Urbana by paying its fair share of taxes or PILOTs. Yet it is just these services that make communities an attractive lure to the talent pool on which Carle and the University depend, and that have

made it the hometown of choice for the majority of the University's Nobel laureates and many of the other highly skilled people who have chosen Urbana as the place they want to live and raise their families.

Great medical centers and great universities recognize the importance of partnering with and investing in their communities, not only as part of their obligation to the citizens they serve, but also as giving them a competitive advantage in recruiting and retaining talent and, in turn, competing at the national and global level. The University of Illinois officials charged with considering a partnership with Carle must take into account not only Carle's potential to become a true national center of excellence in medicine and source of improved healthcare for the citizens of Illinois, but also its willingness to support the public services, schools, parks and libraries that are essential to maintaining a strong civic fabric in its hometown. At this time, Carle Medical Center falls short on both counts, and discussion of the possibility of this proposed partnership must include a tough-minded assessment of whether Carle can live up to the high standards in education, research and community support that distinguish the country's great medical enterprises.

From: Jennifer Woodard [REDACTED]
Sent: Wednesday, November 05, 2014 5:39 AM
To: Phyllis Wise

Dear Phyllis,

Thinking of you this morning in Illinois - a new day. Hope it has given you a much needed morale boost after our dreadful Monday. The prospects for our COM are now exponentially better. Indeed, a healthier U of I is on the horizon under our future Chairman.

Do travel safely. I look forward to seeing you next week and celebrate in person.

Hugs-

Jennifer

From: Normand Paquin [REDACTED]
Sent: Wednesday, November 05, 2014 7:03 AM
To: Phyllis Wise
Subject: Re: Election impact

Will do.

On Nov 5, 2014 6:55 AM, "Phyllis Wise" [REDACTED] > wrote:
Normand,

Tell her you are the one who should be weary, not her. You've had to work through a lot more committees than she has. Tell her to remember this is a marathon, not a sprint (I have to tell myself that sometimes too). The bottom line is that a few faculty on the EPOL committee won't be able to stop this when the BOT gets fully behind it.

Phyllis

Sent from my iPad

On Nov 5, 2014, at 9:51 PM, Normand Paquin <[REDACTED]> wrote:

OK. Gay left me voicemail late yesterday. Didn't go into details but she sounded weary.

On Nov 5, 2014 6:47 AM, "Phyllis Wise" [REDACTED] wrote:
Normand,

We can talk more when I get back. But I am not worried about CK anymore. I think the rest of the board will not allow him to do any damage. In fact, I wonder whether Ny of them will try to change the resolution back to what it was before.

I am eager to learn about Roy's perspective and will try to measure Nick's to see whether he thinks it is good to go for December.

Phyllis

Sent from my iPad

On Nov 5, 2014, at 9:26 PM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

Question becomes whether we now want to make sure President cannot go back to CK and the BOT in January. The resolution could allow CK to damage COM before he heads out I don't know enough about dynamics at that level to advise, but there is value in considering this.

Spoke to Roy last night to convey our conversation and my concerns about Ed Pol meeting. He seemed more positive about moving forward but he will consult with

Gay. He has concerns about giving more time to opponents who are getting organized. It will be worth touching base on this with Roy.

Also concerned about Dec 12 University Senates Conference. I thought Bob made some remark about how the COM was going to be discussed at this meeting. It will be worthwhile for you to talk to Nick.

Normand

Dr. Normand Paquin

Skype: normand_paquin

Tel:



From: Phyllis Wise [REDACTED]
Sent: Thursday, November 06, 2014 1:06 PM
To: Michael DeLorenzo
Subject: Re: COM

Thanks for your email. I agree that the outlook is much brighter now.

Sent from my iPad

On Nov 7, 2014, at 3:33 AM, Michael DeLorenzo [REDACTED] wrote:

Phyllis,

Mike D. here. I just had to tell you that previously when I was over at UA the intimation I would get was that the COM was a longshot at best. Yesterday when I was there for the Governmental Affairs meeting that intimation had changed because of the election of Rauner. The feeling was with Rauner as Governor, and Ed most likely as chair, the COM was now going to be a done deal. Good news. Still many hurdles to go but as I had suggested we wait for the election and that has turned out positive for the the COM.

They spent a good deal of time talking about the transition (that is why I sent that note) and I am sure their feathers will be ruffled that you are on the transition team but we will have to manage through that. For UIUC it is fantastic you are on the transition team, I think it allows us to put our agenda out there front and center as the flagship and that is good!

Mike

From: Normand Paquin [REDACTED]
Sent: Sunday, November 09, 2014 9:20 AM
To: Phyllis Wise
Subject: Re: Ahead of Sunday
Attachments: Draft time line 2014-11-09.pptx

Phyllis,

Sounds good. Attached is perhaps more realistic overall time line at this point.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Sat, Nov 8, 2014 at 9:01 PM, Phyllis Wise [REDACTED] wrote:
Normand,

Thanks for the heads up. Nick has been unbelievably involved and we have had so many email and phone exchanges. No other faculty member has done this. So he and I decided that we should meet and add whoever else was available. I will try to make amends tomorrow.

Phyllis

From: Normand Paquin [REDACTED]
To: Phyllis Wise [REDACTED]
Sent: Saturday, November 8, 2014 5:15 PM
Subject: Re: Ahead of Sunday

Phyllis,

I didn't realize you would be arriving so late. I'm about to spend an evening with my family and I'd rather let you relax and recover from the trip anyway!

So let me just write what I was going to say. I'll assume you'll adjust regarding how written words can make something seem more dramatic than intended.

I believe you inadvertently upset Roy in the manner you wrote your invitation to the Sunday meeting. It came across from his perspective as if you felt you only felt the need to talk to Nick and if others could not take part, so be it. My sense is that Roy feels he's the one that went out on the limb to ask the committees to respond to his request for feedback on an extremely short turnaround and he certainly feels it should have been viewed as important to include him. When I was talking to him on Thursday, I also expressed concern that neither you or Ade was scheduled to be in town for the Nov 17 Academic Senate meeting (I will also be out of town - in D.C.). He jumped on that as justification for not addressing the COM at the Nov. 17 meeting.

The delay is good. Folks at the Friday morning 9 AM COM meeting emphasized the need to get the faculty on board. I need the time. They also felt it was imperative to shift gears and not even think about January 17th.

Look forward to the discussion tomorrow.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Fri, Nov 7, 2014 at 10:29 AM, Phyllis Wise <[REDACTED]> wrote:
Ok. I'll call when I get home.

Sent from my iPad

On Nov 7, 2014, at 10:49 PM, Normand Paquin <[REDACTED]> wrote:

This will be brief and helpful.

On Nov 7, 2014 7:16 AM, "Phyllis Wise" <[REDACTED]> wrote:
I'll try to call you on Saturday after I get home. But to be honest I have to work on three talks
thY I have to give next week and one is in front of 700 alums.

Sent from my iPad

On Nov 7, 2014, at 10:03 PM, Normand Paquin <[REDACTED]> wrote:

Safe travels Phyllis,

If at all possible, it would be good to talk briefly ahead of Sunday's meeting. I
think it would help you manage the dynamics of the meeting.

Normand

From: [REDACTED]
Sent: Thursday, November 13, 2014 10:21 PM
To: [REDACTED]
Subject: Re: Rauner.

I hope that you can meet her on Saturday when she is in Champaign
She can be reached at [REDACTED]

Republicans don't do a great job of figuring out well qualified women for important posts. You can help them with this.

-----Original Message-----

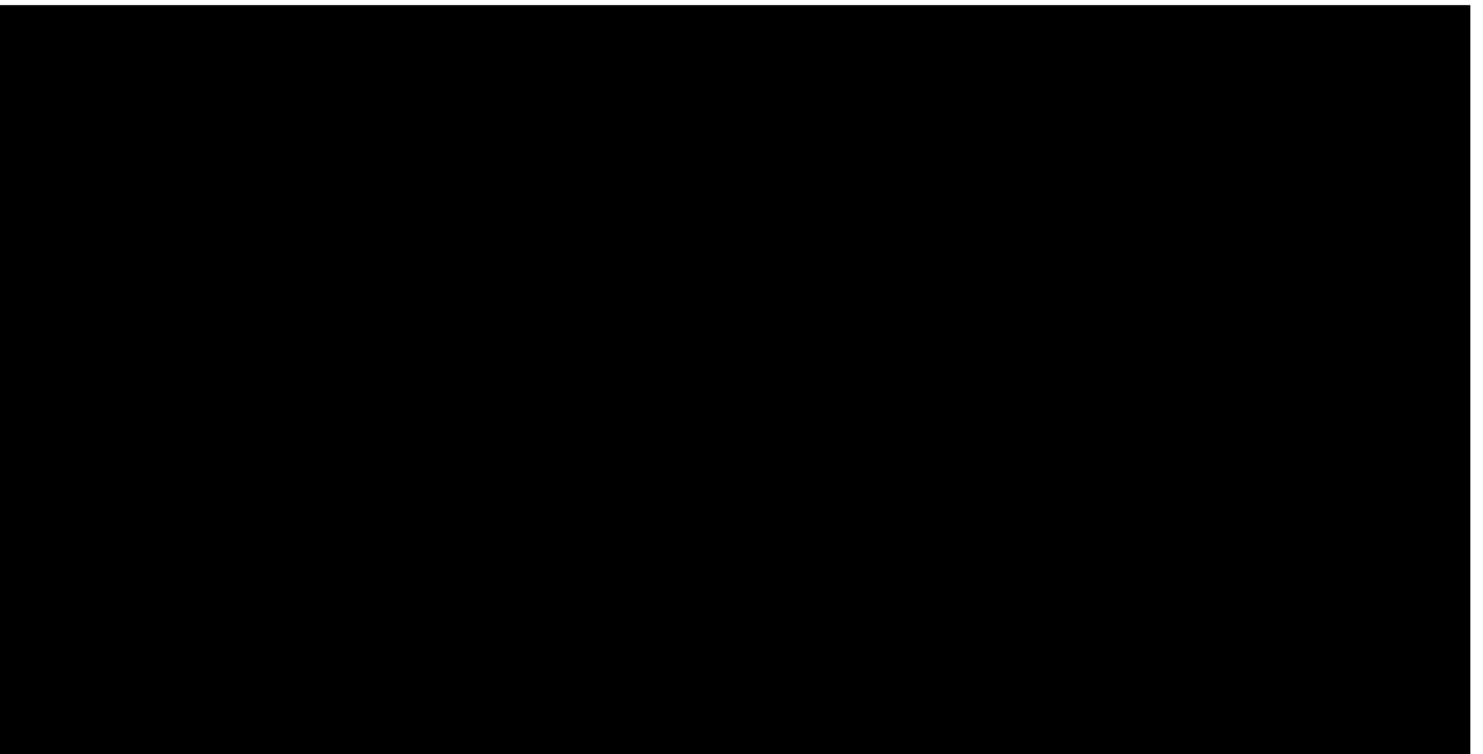
From: Phyllis Wise <[REDACTED]>
To: amarkneu <[REDACTED]>
Sent: Thu, Nov 13, 2014 10:58 pm
Subject: Re: Rauner.

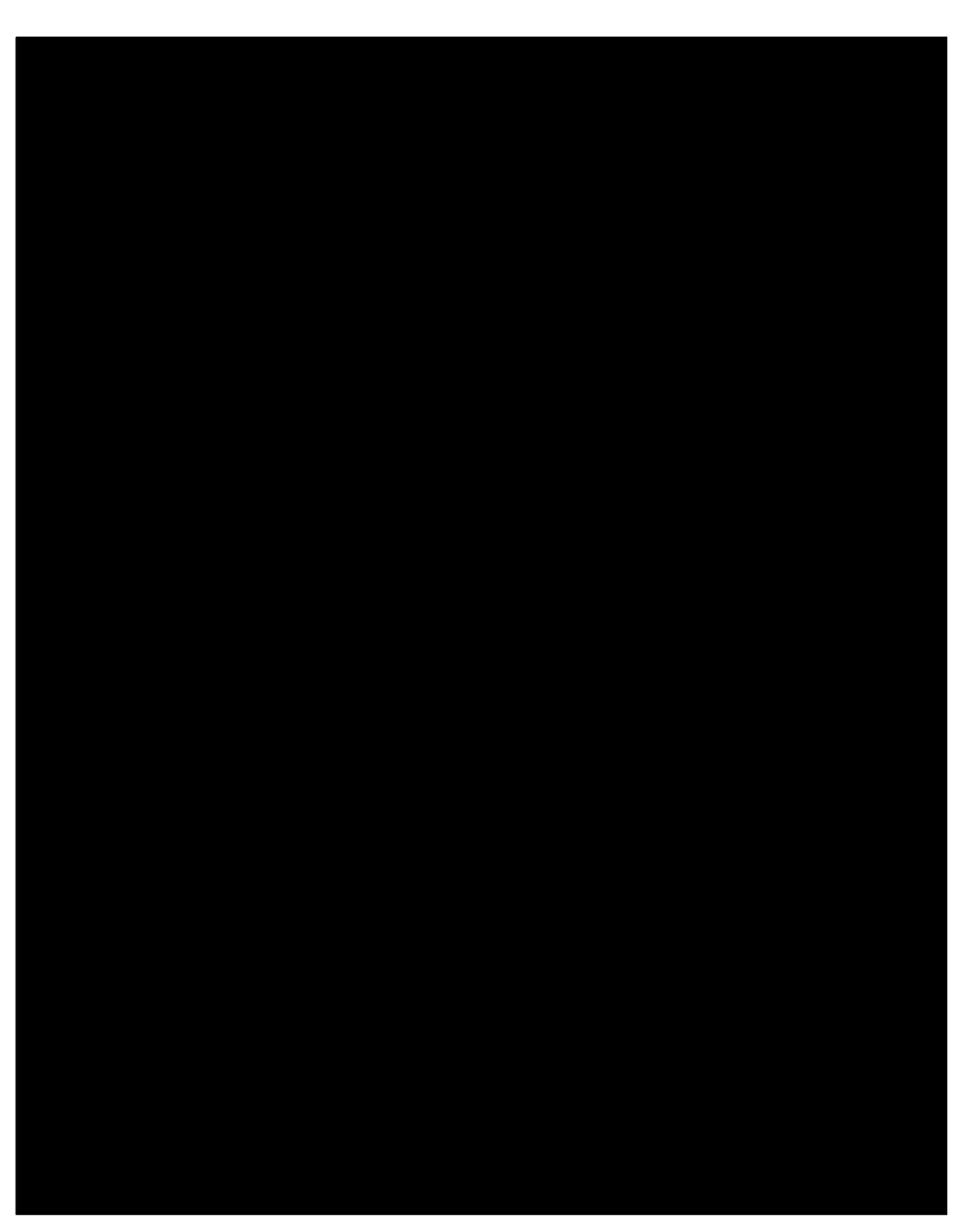
Mark,

I talked with Ed McMillan and then sent him information on [REDACTED] googled her first and was able to get details that I was able to include in my email to him..

Phyllis

From: [REDACTED] <[REDACTED]>
To: [REDACTED]
Sent: Thursday, November 13, 2014 8:32 PM
Subject: Rauner.





From: [REDACTED]
Sent: Sunday, November 16, 2014 5:17 PM
To: Ilesanmi Adesida
Subject: Re: Thanks

Dear Ade,

It's great meeting you again. I am doing my best to set you up with the right contacts for our little project... Take care and have a great weekend. Look forward to hosting you and your "boss" in Taipei.

Best, [REDACTED]

[REDACTED]

寄件人 : Ilesanmi Adesida <[REDACTED]>
日期 : 2014/11/15 上午 11:11:28 CST
主旨 : Thanks

Dear [REDACTED]

Thanks for taking time out of your busy schedule to attend to us and give us a great dinner two weeks ago. It is always a pleasure to see you. I would like to thank you also for your great generosity and support to your alma mater. Alumni like you challenge us to be the best with your support and we do take up the challenge and hope to measure up or even exceed the goals that we aim for. The College of Engineering and, in particular, the Department of Mechanical Science and Engineering is sky high on what your recent gift will mean for them in terms of student and faculty excellence for the future. The campus is very happy because we derive a lot of our reputation from Engineering. The new building addition will be a catalyst for greater achievements.

We will keep talking to [REDACTED] and see how we can all collaborate. I saw the plans for the Cancer Center. It is really amazing and impressive! What I see will definitely exceed \$500M by the time it is completed. It is awe-inspiring. If we are able to realize our ambition of having an Engineering-Driven College of Medicine, this is a natural platform for collaborations with NTU Medicine, especially the Cancer Center. We are excited at the prospects. As you always say, let's make it happen!

Greetings from my wife to you and your family. She is very excited about making a trip to Taipei and Taiwan in general next year. She is looking forward to it. It may be in June or July. We will try to fix the dates way in advance so we can meet you in Taiwan.

Greetings to all.
Ade

PS: Again, thanks for the iPhone.

From: Normand Paquin [REDACTED]
Sent: Monday, November 17, 2014 9:17 AM
To: Phyllis Wise
Cc: Peterson Dan
Subject: Re: Fundraising

Quick note of clarification for Dan: I asked Molly to let you know about the LCME statement. I did not email you directly as I was on my way to [REDACTED]

Normand

Dr. Normand Paquin
Skype: normand_paquin
[REDACTED]

On Mon, Nov 17, 2014 at 9:15 AM, Normand Paquin <[REDACTED]> wrote:
Phyllis,

I assume this may lead to changes in fundraising strategy and objectives once we get going.

The budget assumes we will have secured ~\$115.8 million for the endowment in the first six years. However, this corresponds to a contribution towards operations of "only" ~\$10.1 million during those first six years. In other words, getting some funds to apply directly to operations (that we have in our budget) in the early going would probably go a long way to removing concerns on this one. I'll defer to Dan on this matter.

Normand

Dr. Normand Paquin
Skype: normand_paquin
[REDACTED]

On Mon, Nov 17, 2014 at 8:32 AM, Phyllis Wise <[REDACTED]> wrote:
Thanks, Normand, for letting me know. Please remind me what we have promised for the first 6 years. I know it is \$135m over 8, but I don't know the breakdown for the first 6. When do we actually go to LCME formally?

Phyllis

Sent from my iPad

On Nov 17, 2014, at 6:15 AM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

On Friday, Laura took part in a call with the LCME to discuss risk assessments. She shared this with Molly, Vicky and I:

We had a call with LCME today. They talked at length about the financial stability needed to achieve accreditation, which includes the need for revenue to be secured. If the new COM pro forma is reliant on fundraising support, that funding must be "in the bank" before accreditation for likely at least the first 6 years of operation. It could be formal commitment agreement, but they prefer that it to be in an endowment or escrow account. Just wanted to make sure you are aware of this timing implication beyond the Carle support.

I forwarded the message to Dan. This likely changes the fundraising time line and objectives. I assume Dan will talk to you about this if he hasn't already done so.

I am in DC today for meetings with NIST on material genomics and big data.

Normand

Dr. Normand Paquin
Skype: normand_paquin
[REDACTED]

From: [REDACTED] and Dan Peterso
Sent: Monday, November 17, 2014 9:47 AM
To: Dan Peterson
Subject: Fwd: Fundraising

Begin forwarded message:

From: Normand Paquin <[REDACTED]>
Date: November 17, 2014 at 9:17:14 AM CST
To: Phyllis Wise <[REDACTED].m>
Cc: Peterson Dan <[REDACTED]>
Subject: Re: Fundraising

Quick note of clarification for Dan: I asked Molly to let you know about the LCME statement. I did not email you directly as I was on my way to D.C.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

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I assume this may lead to changes in fundraising strategy and objectives once we get going.

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Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Mon, Nov 17, 2014 at 8:32 AM, Phyllis Wise <[REDACTED].m> wrote:

Thanks, Normand, for letting me know. Please remind me what we have promised for the first 6 years. I know it is \$135m over 8, but I don't know the breakdown for the first 6. When do we actually go to LCME formally?

Phyllis

Sent from my iPad

On Nov 17, 2014, at 6:15 AM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

On Friday, Laura took part in a call with the LCME to discuss risk assessments. She shared this with Molly, Vicky and I:

We had a call with LCME today. They talked at length about the financial stability needed to achieve accreditation, which includes the need for revenue to be secured. If the new COM pro forma is reliant on fundraising support, that funding must be "in the bank" before accreditation for likely at least the first 6 years of operation. It could be formal commitment agreement, but they prefer that it to be in an endowment or escrow account. Just wanted to make sure you are aware of this timing implication beyond the Carle support.

I forwarded the message to Dan. This likely changes the fundraising time line and objectives. I assume Dan will talk to you about this if he hasn't already done so.

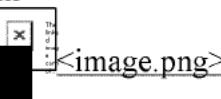
I am in DC today for meetings with NIST on material genomics and big data.

Normand

Dr. Normand Paquin

Skype: normand_paquin

Tel: [REDACTED]



<image.png>

From: Phyllis Wise <[REDACTED]>
Sent: Tuesday, November 18, 2014 11:15 AM
To: Douglas Beck
Subject: Re: Roundup of med school gossip

I had a brief cordial conversation with Prez yesterday.

From: Douglas Beck <[REDACTED]>
To: Phyllis Wise <[REDACTED]>
Sent: Tuesday, November 18, 2014 9:15 AM
Subject: Re: Roundup of med school gossip

Thanks for the information Phyllis--I guess I [REDACTED] appeared recently under your name in some advancement data-base, and had been/is being courted by CoM--now by rule I guess they are not supposed to proceed. I probably have this muddled.

See you tomorrow--hope you have a chance to talk to the new president (today?). Nice to see Dick briefly at the Dial talk last night. I hope you can get a little sleep.

Best,
Doug

On Tue, Nov 18, 2014 at 8:33 AM, Phyllis Wise <[REDACTED]> wrote:
Dear Doug,

Thanks for telling me about the negative conversations. I have had several lunches with [REDACTED] he used to be my neighbor on [REDACTED] and was a practicing [REDACTED] who I thought practiced out of [REDACTED] (that's how little I know about his professional affiliations). He took an interest in my research in estrogen's neuroprotective effects, but other than that we have talked mostly about just neighborly things. He has always called me to find time to meet for lunch, I have not contacted him, mainly because he does it so frequently that I have not had to contact him.

I am not aware of comments that Andreas may have made. It is true that students without some background in engineering writ large will have a hard time in the new COM (I certainly would). But they will still have the option of applying to the UIC COM and request to be at the UIUC site. We have always included continuing the regional COM in our plans, assuming that Dimitri wants us to continue to serve the UIC M1 and MD/PhD program. A contract to do so would need to be written to allow that. We have not considered any of the revenues or expenditures from that program in our financial planning, since we assume that they would be the same as presently so they do not represent new revenues or expenditures.

I know you did not ask for answers to these criticisms, but I thought you might want to have this information in your back pocket.

Thanks for looking for the email. It was so long ago that I doubted you or Nora would have kept it. When the new COM gets its final approval, we will try to contact alums of the UIC COM who got their PhDs in Urbana to let them know. I am aware that many of them count themselves as UIUC alums.. I remember that the person from Philadelphia considered herself a UIUC alum, but I don't remember whether she was an MD/PhD.

Best,
Phyllis

From: Douglas Beck <[REDACTED]>
To: Phyllis Wise <[REDACTED]>
Sent: Tuesday, November 18, 2014 7:36 AM
Subject: Roundup of med school gossip

Dear Phyllis,

Just in case you don't already know--a couple of recent examples of negative conversations

- 1) contacts about gifts you may or may not have had with local physicians (Provena) and who are technically grads of UIC (pre-1982?)--a retired [REDACTED] perhaps?
- 2) some comment Andreas Cangellaris may or may not have made that suggested students for the new medical school with other than engineering backgrounds would not be welcome--here the optics w.r.t. humanities and social sciences are obviously difficult

Always happy to talk if helpful.

Best,
Doug

P.S. Nora and I both looked for an email with the comment of the MSP alum we discussed in the car on the way back from Chicago last Thursday--to no avail--must have been deleted--sorry.

From: Joyce Tolliver
Sent: Thursday, November 20, 2014 9:30 PM
To: Campbell, R H
Subject: Re: CoM

Thanks, Roy.
So, no official USC advice.
We could I suppose give BE comments.

On Thu, Nov 20, 2014 at 9:22 PM, Campbell, R H <rhc@illinois.edu> wrote:
Norman Paquin wrote to me saying that any further action on COM would have to wait until the first meeting in the New Year – February.

The answers to the committees questions have not been completed.

Roy Campbell
Sohaib and Sara Abbasi Professor of Computer Science
Siebel Center
201 N Goodwin Av, Urbana, IL 61801-2302
Tel 217-333-0215 Email rhc@illinois.edu

Office Manager for Appointments: gwygwon@illinois.edu, phone 217-300-1264

Glad to hear it. I am shifting time table to correspond to lead to March 12 BOT meeting.

Normand

Normand Paquin, PhD, MBA
Associate Director for Research
243 Coordinated Science Laboratory, MC-228
1308 West Main Street
Urbana, IL 61801
Tel: 217-244-6813
Fax: 217-244-1764
Email: paquin@illinois.edu

From: Campbell, R H
Sent: Tuesday, November 18, 2014 3:54 PM
To: Paquin, Normand
Subject: Re: COM

Yes thanks Roy

Roy Campbell
Sohaib and Sara Abbasi Professor of Computer Science
Siebel Center
201 N Goodwin Av, Urbana, IL 61801-2302
Tel 217-333-0215 Email rhc@illinois.edu

Office Manager for Appointments: gwygwon@illinois.edu, phone 217-300-1264

From: <Paquin>, Normand Paquin <paquin@illinois.edu>
Date: Tuesday, November 18, 2014 at 3:51 PM
To: Roy Campbell <rhc@illinois.edu>
Subject: RE: COM

Hi Roy,

I'm currently looking at the Feb. 9 Academic Senate meeting as the one that will address the COM.

I'm working with Gay on Dec. 1 Ed Pol meeting to set up a panel to discuss the cross-campus benefits of COM but there is more to do with this committee.

I have engaged Mike and Nolan from the budget committee to work in tandem to develop a risk assessment document. They have a meeting Dec. 8 but I don't necessarily expect to have the risk assessment piece ready by then. They are open to have a special meeting ahead of the Feb 2 SEC meeting.

I will also need to get the risk assessment piece to Ed Pol. I see that coming to them ahead of their January 26 meeting for discussion then.

I don't think we need to meet with the USSP again but I have promised to keep Bill Maher apprised of development on the definitive agreements.

Is this helpful?

Normand

Normand Paquin, PhD, MBA
Associate Director for Research
243 Coordinated Science Laboratory, MC-228
1308 West Main Street
Urbana, IL 61801
Tel: [217-244-6813](tel:217-244-6813)
Fax: [217-244-1764](tel:217-244-1764)
Email: paquin@illinois.edu

From: Campbell, R H
Sent: Tuesday, November 18, 2014 3:44 PM
To: Paquin, Normand
Subject: COM

Norman:

Do you have any updates on what you would expect the Senate agenda on this item would be? If so, and if the deadline is December,
are you going to handle the questions from the committees and do these answers need to be sent back to the committees?

I'll try to find out when the next meetings of the committees will be and let you know.

Roy

Roy Campbell
Sohaib and Sara Abbasi Professor of Computer Science
Siebel Center
201 N Goodwin Av, Urbana, IL 61801-2302
Tel [217-333-0215](tel:217-333-0215) Email rhc@illinois.edu

Office Manager for Appointments: gwygwon@illinois.edu, phone 217-300-1264

From: Nick Burbule [REDACTED]

Date: Thursday, November 20, 2014 at 9:09 PM

To: Roy Campbell [REDACTED], Joyce Tolliver [REDACTED]

Subject: CoM

Hi folks,

If we are hoping to have a Normand 2.0 statement or resolution reviewed/approved by the three subcommittees and ready for senate review, we need to start thinking about it.

I'm in Ecuador all next week.

Nick

--
Joyce Tolliver

From: Jtolliver
Sent: Thursday, November 20, 2014 10:22 PM
To: Nick Burbules
Subject: Re: CoM

Yep.
But--well, you know what I think about the Board resolution.

Joyce Tolliver

On Nov 20, 2014, at 22:00, Nick Burbules [REDACTED] wrote:

This is going to cause a problem with Bob. But I'll let Roy explain it to him.

On Thu, Nov 20, 2014 at 9:59 PM, Nick Burbules [REDACTED] > wrote:
Sigh yes.

On Thu, Nov 20, 2014 at 9:48 PM, Joyce Tolliver [REDACTED] > wrote:
Looks like Roy's note settles it.

On Thu, Nov 20, 2014 at 9:25 PM, Nick Burbules [REDACTED] wrote:

On Thu, Nov 20, 2014 at 9:19 PM, Joyce Tolliver [REDACTED] wrote:
I think we could put a placeholder on the agenda, no?

Yes, I thought we discussed that. (Though in other contexts I have said I don't like placeholders.)

But even so, if there is to be something for the senate to vote on, Jenny would need it by I think that Tuesday 5pm or Wednesday morning.
Could we say by then that the committees supported establishment of the college?

The wording would have to be delicate. They have some serious questions, I gather, and they haven't all been answered yet. So they probably wouldn't sign on to a statement that says, simply, "We support the establishment . . ."

The fact is, there just might not be any way to do it, from a time standpoint or a gaining support standpoint. And I don't have any insights about what wording might square the circle:

"While we have some questions of detail and expect more information, we . . . we what?"

On Thu, Nov 20, 2014 at 9:16 PM, Nick Burbules [REDACTED] wrote:

Oh oh

On Thu, Nov 20, 2014 at 9:11 PM, Joyce Tolliver [REDACTED] wrote:

Oh no--do we have to have something ready for the SEC agenda by tomorrow afternoon?

On Thu, Nov 20, 2014 at 9:09 PM, Nick Burbules [REDACTED] wrote:

Hi folks,

If we are hoping to have a Normand 2.0 statement or resolution reviewed/approved by the three subcommittees and ready for senate review, we need to start thinking about it.

I'm in Ecuador all next week.

Nick

--

Joyce Tolliver

--

Joyce Tolliver

--

Joyce Tolliver

Message

From: Phyllis Wise [REDACTED]
Sent: 11/23/2014 3:47:16 PM
To: Paul Umbach [PUmbach@trippumbach.com]
Subject: Re: Interested in Continuing our Assistance to UIUC from January through March 2015

Paul,

I just tried to call. I am free for the rest of the day and evening. Please give me a call when you have time.

Looking forward to catching up,
Phyllis

From: Paul Umbach <PUmbach@trippumbach.com>
To: 'Phyllis Wise' [REDACTED]
Sent: Sunday, November 23, 2014 9:02 AM
Subject: RE: Interested in Continuing our Assistance to UIUC from January through March 2015

Hi friend,

I know you are completely crazy and overwhelmed – but remember you have the best team on the planet (and some friends in Pittsburgh). My (overly formal) email was just to get the ball started so that we can continue to be available as you need us. The realities of contractual relationships forces such emails from time to time.

Beyond all of this, I value our friendship and see you and me having a long and fun partnership beyond the craziness of today. ☺

So, please call if you get a free second tonight as I am home alone with my dog waiting for [REDACTED] to arrive late. We are doing a [REDACTED] to [REDACTED] to visit [REDACTED] on Wednesday – so calling me while doing the 10 hour drive would work great for me.

Thanks friend.

☺

Paul O. Umbach
Founder and President
Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313
Cell Number: [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

"Turning ideas into action for 25 years"

From: Phyllis Wise [mailto: [REDACTED]]
Sent: Saturday, November 22, 2014 6:06 PM
To: Paul Umbach
Cc: Normand Paquin ([REDACTED]); Beth Paul; Laura Frerichs ([REDACTED]); Ha Pham
Subject: Re: Interested in Continuing our Assistance to UIUC from January through March 2015

Paul,

I have been meaning to call you to give you an update on where we are and our next steps. It's been an absolutely crazy time. I promise I will call tomorrow.

Phyllis

From: Paul Umbach <PUmbach@trippumbach.com>
To: ' [REDACTED]
Cc: "Normand Paquin" ([REDACTED]); Beth Paul <BPAUL@trippumbach.com>; "Laura Frerichs ([REDACTED])" ([REDACTED]); Ha Pham <HPham@trippumbach.com>
Sent: Saturday, November 22, 2014 4:24 PM
Subject: Interested in Continuing our Assistance to UIUC from January through March 2015

Dear Phyllis:

First, we have enjoyed our partnership and friendship with your team this year. As we get closer to the completion of our business plan assignment, I want to offer our assistance as you move forward in the uncertain waters in January through March when the President (who knows who) will be developing a report for the Chair of the Board (again, who knows who).

What we DO know is that you have a great plan for a game changing College of Medicine that will transform your university and the state. I am confident that Tripp Umbach's continued assistance through a contract extension will be valuable as you receive additional requests for information and analysis during this critical period.

I chose to email you on your personal email because I want to "test the waters" with my proposal privately. Please understand that we are 100% open and excited to also help Carle Health System during this period, but I would like the idea of continuing to use our services (if you feel this way of course) to come from you Phyllis. I do not believe that the other consulting firm can alone meet your collective needs.

I see Tripp Umbach as being able to provide the UIUC with horsepower and expertise in accreditation, curriculum refinement, business model sensitivity analysis, interface with System level consultants who the President will hire, interface with proposals from UIC and their consultants, further financial and fundraising analysis, preliminary search process for a founding dean, etc. My reading of the Nov 13th board resolution is that things are likely to get very busy by the end of March as many new questions about your plans will be raised.

Thank you Phyllis of your consideration of my request to discuss and develop a potential contract extension for the period January 1, 2015 through March 31, 2015. Beth, Ha and I are very committed to the ultimate success of your school and as such want to continue as members of your team. I copied your team and mine on this email to keep everyone in the loop.

Sincerely yours,

Paul

Paul O. Umbach

Founder and President

Tripp Umbach
2359 Railroad St. #3701

Pittsburgh, PA 15222

Corporate Headquarters: 412.281.2313

Cell Number: [REDACTED]

Fax Number: 412.281.9946

www.trippumbach.com

"Turning ideas into action for 25 years"

From: Ed McMillan [REDACTED]
Sent: Monday, November 24, 2014 8:13 AM
To: Phyllis Wise
Subject: Re: a few unrelated items

Yes, we need to seriously discuss it. How much will it take to fully endow it! Another idea would be to endow the An Sci dept chair.

Ed McMillan
McMillan LLC
[REDACTED]

On Nov 23, 2014, at 11:51 PM, Phyllis Wise <[REDACTED]> wrote:

Dear Ed,

First, thanks for letting me know about [REDACTED] actually I suspect that with all the names I have heard about [REDACTED] and numerous others being presented by the UIAA - [REDACTED] (the name I hear most often), I don't think [REDACTED] will be competitive.

Second, I have a meeting with Bob tomorrow. I plan to talk about next steps in the COM and how to handle the resolution. I will let you know how that goes. I understand that they (but I don't know who the they is) want Bob to take care of this before Tim comes takes over. I think that is good. But I think Bob should seek advice from you as to how to expedite this.

Third, I would love to find a time to talk with you in more detail about the possibility of raising funds to endow the Deanship of ACES in Bob's name. We only had a little time to touch briefly on this. While I would love to do this by meeting with you, I think we would like to get an idea of how feasible you think this is, whether you would like to invest in this, who else we should approach so that we can hopefully announce something by July 1 when he transitions out. I will ask Phyllis to check on your calendar and mine to see whether we can find a time to meet in the next 2-3 weeks and if not, whether we can touch base by phone.

Finally, I hope you have a wonderful Thanksgiving with all of your family. Thanksgiving is always a lot of work, but hopefully so much fun that the work is worth it. We have a lot to be grateful for. I am so eager to have the opportunity to work with you! Please give my best wishes to Judy.

Best,
Phyllis

From: Normand Paquin [REDACTED]
Sent: Monday, November 24, 2014 10:03 AM
To: Phyllis Wise
Subject: Notes on process from Nick

Phyllis,

This is an extract from exchange I had with Nick. It does appear that Bob could ask for informal input from USC but not official input if proposals have not gone through the respective senates.

I hope that is helpful in your discussions.

--

Nick's input is in bold.

...., the USC is meant to simply pass through such a resolution via the President to the BOT.

With its "advice." Strictly speaking, the USC cannot consider a proposal UNTIL it comes to it via the senates.

(And by the way, there IS no proposal at this stage that has passed the UIC senate.)

Here, it appears we have a situation where Don Chambers could ask USC subcommittees to examine the consequences of the resolution in order to give "USC's advice" to the President.

I think that is unlikely. The President needs to give his input by March. USC can't sit on it. Plus, it isn't up to Don how the USC handles this. The full Conference would have to consider how to handle it.

In the end, it is a matter of what kind of "advice" Bob asks for, and when. I thought this would be at the Dec 12 USC mtg. But if the senates don't pass anything it would more likely to be the Feb mtg.

The question I have for you is the following: if the proposal becomes part of the formal submission process by formally being submitted to the Ed Pol Committee, can Bob Easter proactively ask the USC to begin their evaluation of it?

Well, I think he can ask for whatever kind of input he wants to ask for, and USC will give it, even if informally. But if our committees are still dealing with it, I don't see how USC can do anything FORMALLY with a proposal that isn't in their hands yet (vote, refer to committee, etc) - that would be premature.

What if it is put formally on the Feb 8 Senate agenda by the UIUC SEC, can Bob make the request to the USC before the USC has it on hand?

Yes, I think he can. (Joyce might disagree.) But any USC advice under those circumstances would be preliminary and informal.

--

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED] [REDACTED]

From: Peter B. Fox <peterf@fox-companies.com>
Sent: Tuesday, November 25, 2014 5:58 AM
To: Rick Stephens
Cc: [REDACTED] Jim Leonard; Chris Meyer; Greg Lykins
Subject: Re: Meeting with Dr Easter

The carle uiuc efforts suffered due to poor leadership chosen by both entities Seems that is fixed now

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED] peterf@fox-companies.com www.fox-companies.com

> On Nov 24, 2014, at 11:07 PM, Rick Stephens <rick@investres.net> wrote:

>

> Fellow Dreamers,

>

> We recently discussed that since Dr Killeen has been announced, it might be good for our group to have another meeting with Dr. Easter similar to the meeting in his office last July. The purpose was to get a better understanding of his intentions RE the COM during the time between now and when Dr. Killeen takes office. As it turns out, Greg had a meeting scheduled with Dr. Easter this morning and they allowed me to join them, so we had a chance to talk with him about it.

>

> In summary, I would say that he remains positive toward the idea and is moving the process along as quickly as he can. From what I understand, he has been asked to present his findings to the Trustees at the March meeting and he intends to stay on that schedule. However, the correct process must be followed and he is dependent on others for many of the steps. He indicated he is looking toward Huron Consulting for more assistance in answering the questions given him by the Trustees and proving the worthiness of UIUC having its own accredited COM; the Faculty Senate needs to be fully apprised of the new COM plans and officially sign off; likewise for the Senate Conference; and he believes must have a plan for the M1 students at UIUC to be served elsewhere either by the start of new COM or to be phased out in the not too distant future (he does not believe it is realistic to have 2 "medical schools" at the same campus). This is in addition to all the work Phyllis and her team are doing to show why this is the right way to go vs at UIC or some other plan. In other words, all the processes required for a new college to be established must be buttoned up before March. And the process can't be short-cut. For example the Faculty Senate must receive everything it needs to make a decision in plenty of time to make a good decision - if given the plan in February it's not reasonable to expect them to sign off on it in time to present at March Trustee meeting.

>

> Greg and I got the impression that Dr. Easter is moving forward and will likely not be the one to slow it down. But he understandably believes the process should be fully followed with the plan fully vetted and communicated. I didn't understand all that's required but of course Phyllis knows. If all is completed in good time for the different stakeholders at the University to approve the COM in time to prepare for the March meeting, then Dr. Easter seems to be on board. Of course that is a lot of work to be done very quickly. I think Normand and Stephanie are working on a timetable that will make this possible but we need to make sure that every piece of the puzzle along with an appropriate timeline is on that schedule they are using. In particular, we need to give groups that need to approve, enough time to not rush them too much or it will appear we're ramming it through the University.

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> Dr. Easter mentioned that UIC Rockford medical school is vibrant and a critical element of that economy. They are not expected to create any political hurdle necessarily since the new COM would not be hindrance to them. However,

anything threatening to them would become an issue and on the other side, anything from the new COM that would help them would be a plus. He does not expect any particular pushback from Peoria either. UIC Chicago is threatened of course but there is hope that a new chancellor and a new Vice Chancellor of Health Affairs, in time, could create a more forward looking situation there, resulting in a wonderful model of cooperation and synergy between UIUC and UIC Med Schools. Their unique DNA's (our biomedical/engineering/big data innovative research and their large, diverse client base) would fit like a glove.

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> I have invited Dr Killeen to a small dinner at our home with the intention of you all and spouses/partners attending. The purpose is for our group to have the chance to get to know Dr Killeen and his wife, as well as for him to learn about our hopes and dreams for the community. And I believe Peter is trying to arrange a meeting with Ed McMillan for those of us who can attend to bring him up to date with where we are. Peter is also scheduling a meeting with David Donnini who was Bruce Rauner's partner at GTCR.

>

> Thanks fellow citizens,

>

> Rick

From: Peter B. Fox <peterf@fox-companies.com>
Sent: Tuesday, November 25, 2014 6:30 AM
To: Rick Stephens; [REDACTED] Jim Leonard; Chris Meyer
Cc: Greg Lykins
Subject: RE: Meeting with Dr Easter

Thank you rick very thorough
I believe lunch with david will be dec 19 I will reach ed today

Peter B. Fox
Chairman
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

-----Original Message-----

From: Rick Stephens [mailto:rick@investres.net]
Sent: Monday, November 24, 2014 10:08 PM
To: [REDACTED]; Jim Leonard; Chris Meyer; Peter B. Fox
Cc: Greg Lykins
Subject: Meeting with Dr Easter

Fellow Dreamers,

We recently discussed that since Dr Killeen has been announced, it might be good for our group to have another meeting with Dr. Easter similar to the meeting in his office last July. The purpose was to get a better understanding of his intentions RE the COM during the time between now and when Dr. Killeen takes office. As it turns out, Greg had a meeting scheduled with Dr. Easter this morning and they allowed me to join them, so we had a chance to talk with him about it.

In summary, I would say that he remains positive toward the idea and is moving the process along as quickly as he can. From what I understand, he has been asked to present his findings to the Trustees at the March meeting and he intends to stay on that schedule. However, the correct process must be followed and he is dependent on others for many of the steps. He indicated he is looking toward Huron Consulting for more assistance in answering the questions given him by the Trustees and proving the worthiness of UIUC having its own accredited COM; the Faculty Senate needs to be fully apprised of the new COM plans and officially sign off; likewise for the Senate Conference; and he believes must have a plan for the M1 students at UIUC to be served elsewhere either by the start of new COM or to be phased out in the not too distant future (he does not believe it is realistic to have 2 "medical schools" at the same campus). This is in addition to all the work Phyllis and her team are doing to show why this is the right way to go vs at UIC or some other plan. In other words, all the processes required for a new college to be established must be buttoned up before March. And the process can't be short-cut. For example the Faculty Senate must receive everything it needs to make a decision in plenty of time to make a good decision - if given the plan in February it's not reasonable to expect them to sign off on it in time to present at March Trustee meeting.

Greg and I got the impression that Dr. Easter is moving forward and will likely not be the one to slow it down. But he understandably believes the process should be fully followed with the plan fully vetted and communicated. I didn't

understand all that's required but of course Phyllis knows. If all is completed in good time for the different stakeholders at the University to approve the COM in time to prepare for the March meeting, then Dr. Easter seems to be on board. Of course that is a lot of work to be done very quickly. I think Normand and Stephanie are working on a timetable that will make this possible but we need to make sure that every piece of the puzzle along with an appropriate timeline is on that schedule they are using. In particular, we need to give groups that need to approve, enough time to not rush them too much or it will appear we're ramming it through the University.

Dr. Easter mentioned that UIC Rockford medical school is vibrant and a critical element of that economy. They are not expected to create any political hurdle necessarily since the new COM would not be hindrance to them. However, anything threatening to them would become an issue and on the other side, anything from the new COM that would help them would be a plus. He does not expect any particular pushback from Peoria either. UIC Chicago is threatened of course but there is hope that a new chancellor and a new Vice Chancellor of Health Affairs, in time, could create a more forward looking situation there, resulting in a wonderful model of cooperation and synergy between UIUC and UIC Med Schools. Their unique DNA's (our biomedical/engineering/big data innovative research and their large, diverse client base) would fit like a glove.

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Either Greg or I would be happy to answer any questions you might have.

I have invited Dr Killeen to a small dinner at our home with the intention of you all and spouses/partners attending. The purpose is for our group to have the chance to get to know Dr Killeen and his wife, as well as for him to learn about our hopes and dreams for the community. And I believe Peter is trying to arrange a meeting with Ed McMillan for those of us who can attend to bring him up to date with where we are. Peter is also scheduling a meeting with David Donnini who was Bruce Rauner's partner at GTCR.

Thanks fellow citizens,

Rick

From: Lykins, Greg <Gregory.Lykins@busey.com>
Sent: Tuesday, November 25, 2014 9:48 AM
To: Phyllis M Wise
Subject: Fwd: Happy Thanksgiving!

fyi

Sent from my iPad

Begin forwarded message:

From: Ed McMillan [REDACTED]
Date: November 25, 2014 at 9:46:21 AM CST
To: "Lykins, Greg" <Gregory.Lykins@busey.com>
Subject: RE: Happy Thanksgiving!

Thanks Greg... you are very KIND!!! Speaking of doing lots for the U of I... you are also to be complemented for your past, current, and anticipated future commitments... THANK YOU!!!

BTW, I never assume responsibility for controlling [REDACTED] activities, especially at Thanksgiving!!!

Ed

Ed McMillan
McMillan L.L.C.
105 North Third Street, Suite 204
Greenville, IL 62246
Office 618-664-9600
Cell [REDACTED]

-----Original Message-----

From: Lykins, Greg [<mailto:Gregory.Lykins@busey.com>]
Sent: Tuesday, November 25, 2014 9:24 AM
To: Ed McMillan
Subject: Happy Thanksgiving!

Good Morning Ed,

It was a delight seeing and visiting with you last night. I just want to thank you again for all you do for all of us. Your commitment to the university is phenomenal. It is not as though you couldn't find something else more fun to do.

If I can ever be of assistance through all of your activities, please let me know.

All the best and Happy Thanksgiving to you and your family!

Greg

PS. Make sure your [REDACTED] doesn't eat too much turkey ..

Sent from my iPad

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<http://www.busey.com>.

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<http://www.busey.com>.

From: Lykins, Greg <Gregory.Lykins@busey.com>
Sent: Tuesday, November 25, 2014 7:36 PM
To: Phyllis M Wise; James Leonard; Rick Stephens; Peter Fox
Subject: Fwd: Thank you!

Sent from my iPhone

Begin forwarded message:

From: "Easter, Robert A" <reaster@uillinois.edu>
Date: November 25, 2014 at 6:55:56 PM CST
To: "Lykins, Greg" <Gregory.Lykins@busey.com>
Cc: "Stephens, Rick L." <rick@investres.net>, "Clements, Vicki" <vclement@uillinois.edu>
Subject: Re: Thank you!

Greg, I very much appreciated the opportunity to meet but more than that I appreciate the work that you, Rick and other leaders do to make our community and economically vibrant place to live. Never hesitate to call if I can ever be of help.

Hope I didn't take too much of your time.

Bob

Sent from my iPad
Robert A. Easter, Ph.D.
President, University of Illinois

506 S.Wright Street	1737 West Polk Street
Urbana, Illinois 61801	Chicago, Illinois 60612
(217)333-3070	(312)413-8301
FAX (217)333-3072	FAX (312)413-8301
E-mail: reaster@uillinois.edu	

On Nov 25, 2014, at 9:46 AM, "Lykins, Greg" <Gregory.Lykins@busey.com> wrote:

Good Morning President Bob,

Thank you again for taking your very valuable time to visit with Rick and me. Please be assured that we appreciate your role and responsibility of allocating the tremendously valuable and scarce resources of the University.

As we mentioned, in addition to the natural research and educational aspects of the medical school, we sincerely believe the potential nimbleness and

entrepreneurial opportunities can be huge for the future of the university and its many constituencies.

Please know we are available in any way to assist you in any of your efforts .. related to the medical school or any other activities.

Happy Thanksgiving and all the best,

Greg

Sent from my iPad

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<http://www.busey.com>.

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<http://www.busey.com>.

From: Ilesanmi Adesid [REDACTED]
Sent: Tuesday, November 25, 2014 11:27 PM
To: Phyllis M Wise
Subject: Re: Call from Karla Vandivier in Dean Michele Mariscalco's office at the College of Medicine

Phyllis,

I don't know Karla. I am not sure what she could be looking for. I know that the faculty and staff there have been put in an uncomfortable position. They are not to talk to us because of conflict of interest. The only problem is that many of them would like to move into NewCOM if it does happen. The best thing is for Greg to meet with Karla and find out what she wants.

Ade

On Tue, Nov 25, 2014 at 6:57 PM, Phyllis M Wise [REDACTED] wrote:
Interesting. Any advice?

Sent from my iPhone

Begin forwarded message:

From: "Lykins, Greg" <Gregory.Lykins@busey.com>
Date: November 25, 2014 at 4:24:35 PM CST
To: Phyllis M Wise [REDACTED] Peter Fox <peterf@fox-companies.com>, James Leonard <James.Leonard@Carle.com>, "Rick Stephens" <rick@investres.net>
Subject: Fwd: Call from Karla Vandivier in Dean Michele Mariscalco's office at the College of Medicine

Any counsel?

Sent from my iPad

Begin forwarded message:

From: "Marsh, Teresa" <Teresa.Marsh@busey.com>
Date: November 25, 2014 at 2:25:52 PM CST
To: "Lykins, Greg" <Gregory.Lykins@busey.com>
Subject: Call from Karla Vandivier in Dean Michele Mariscalco's office at the College of Medicine

Greg,

She met with Robert Easter recently and he suggested that he have a discussion with you regarding matters involving various interests and that you would be a good resource.

Following are three dates and times that would work for her to come over here for a 45-60 minute visit:

Wednesday, December 3 at 4:00 pm

Tuesday, December 9 at 10:30 am

Tuesday, December 16 at 3:30 pm

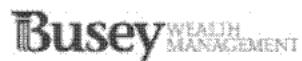
Your calendar appears open at all of these times. Do you have a preference? Thanks. Once I know I will also book a conference room on 4th floor.

Teresa

Teresa Marsh

Assistant Vice President | Corporate Secretary
100 W. University Ave.
Champaign, IL 61820
P: 217.351.6506 | Ext:56506
C: [REDACTED]
F: 217.365.4878

The information contained in this e-mail is privileged and confidential. Unless otherwise indicated or obvious from the message, this is intended only for the individual(s) listed above. Please see our Privacy Notices at <http://www.busey.com>.



From: Ilesanmi Adesid [REDACTED]
Sent: Tuesday, November 25, 2014 11:41 PM
To: Phyllis M Wise
Subject: Re: Meeting with Dr Easter

Phyllis,

Thanks for the info. There is a lot of work to be done. Normand and Stephanie must be working on a time line for all the processes to be in place before March. As identified, even within the constrained time limits, we need to accommodate the various steps along the process so that we don't get delayed. I can see folks up North dragging so we don't meet the deadlines. I know that you are briefing some BoT members this week up in Chicago. we should talk briefly before your trip to Chicago; [REDACTED] told me that they are having dinner with you on Friday or so. We need to see how we can get them to become fund raisers for the NewCOM. Not their own money since they do give to CS, but working with us to bring some well-off folks to the table for the NewCOM.

Ade

On Tue, Nov 25, 2014 at 10:55 AM, Phyllis M Wise [REDACTED] wrote:
I really don't know whether Bob has even asked him yet because he is not sure whether the ceiling of our contract with them does not allow him to contract this latest request with them. Bob said that if we cannot then he would have to contract with Accenture. This wouldn't be good because it would take them a while to get up to speed. I asked whether there is a way get "get around " this limit (e.g. Having the UIF fund it). He said he would check.

Sent from my iPhone

On Nov 25, 2014, at 6:36 AM, "Peter B. Fox" <peterf@fox-companies.com> wrote:

I have continue my dialogue with jim roth/huron

Is he aware of a timetable

<image001.png>

Peter B. Fox

Chairman

1909 Fox Drive

Champaign, IL 61820

O: 217-351-1430 ext. 15 | C: [REDACTED]

peterf@fox-companies.com

From: Phyllis Wise [mailto:[\[REDACTED\]](#)]
Sent: Tuesday, November 25, 2014 6:31 AM
To: Rick Stephens; Jim Leonard; Chris Meyer; Peter B. Fox
Cc: Greg Lykins
Subject: Re: Meeting with Dr Easter

Thanks, Rick and Greg, for taking the time to meet with Bob and for writing such a detailed summary of your meeting. We, the whole Carle and campus team are working as diligently and intensively as we can to meet the timetable that will allow Bob to have all the information that he needs by March. The resolution is onerous, and Bob believes that Huron must do many aspects of that. I hope that part can be completed on time.

Ed will be a strong advocate. It's great that Peter will be meeting with him.

Best wishes to all of you for a great Thanksgiving.

Phyllis

From: Rick Stephens <rj@investres.net>
To: [\[REDACTED\]](#); Jim Leonard <James.Leonard@Carle.com>; Chris Meyer <cmeier@oktocom.com>; Peter Fox <peterf@fox-companies.com>
Cc: Greg Lykins <Greg.Lykins@busey.com>
Sent: Monday, November 24, 2014 10:07 PM
Subject: Meeting with Dr Easter

Fellow Dreamers,

We recently discussed that since Dr Killeen has been announced, it might be good for our group to have another meeting with Dr. Easter similar to the meeting in his office last July. The purpose was to get a better understanding of his intentions RE the COM during the time between now and when Dr. Killeen takes office. As it turns out, Greg had a meeting scheduled with Dr. Easter this morning and they allowed me to join them, so we had a chance to talk with him about it.

In summary, I would say that he remains positive toward the idea and is moving the process along as quickly as he can. From what I understand, he has been asked to present his findings to the Trustees at the March meeting and he intends to stay on that schedule. However, the correct process must be followed and he is dependent on others for many of the steps. He indicated he is looking toward Huron Consulting for more assistance in answering the questions given him by the Trustees and proving the worthiness of UIUC having its own accredited COM; the Faculty Senate needs to be

fully apprised of the new COM plans and officially sign off; likewise for the Senate Conference; and he believes must have a plan for the M1 students at UIUC to be served elsewhere either by the start of new COM or to be phased out in the not too distant future (he does not believe it is realistic to have 2 "medical schools" at the same campus). This is in addition to all the work Phyllis and her team are doing to show why this is the right way to go vs at UIC or some other plan. In other words, all the processes required for a new college to be established must be buttoned up before March. And the process can't be short-cut. For example the Faculty Senate must receive everything it needs to make a decision in plenty of time to make a good decision - if given the plan in February it's not reasonable to expect them to sign off on it in time to present at March Trustee meeting.

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Thanks fellow citizens,

Rick

From: Phyllis M Wise [REDACTED]
Sent: Wednesday, November 26, 2014 7:33 AM
To: Peter B. Fox
Cc: Lykins, Greg; James Leonard; Rick Stephens
Subject: Re: Call from Karla Vandivier in Dean Michele Mariscalco's office at the College of Medicine

Greg,

I checked with Ade because I don't know Dr. Mariscalco well at all. I will be meeting with members of the UIC COM next month. Ade agrees with Peter that it is worthwhile meeting with her. She has been put in a difficult position because Dean Azar has told her to have nothing to do with our efforts to establish a COM and in fact not to allow her faculty to participate in any of the working groups.

It will be important for you to point out that our plans calls for us to continue to teach the M1 and the MD/PhD students who are enrolled in the UIC COM uninterrupted. We would continue to teach their curriculum as desired by their COM. Our COM would only impact the UIC COM if Azar wants to make it that way.

Hope your meeting with her is fruitful.

Phyllis

She has been put

Sent from my iPhone

On Nov 25, 2014, at 4:45 PM, "Peter B. Fox" <peterf@fox-companies.com> wrote:

I don't know her
Always worth listening to

Sent from my iPhone

Peter B. Fox

1909 Fox Drive

Champaign, IL 61820

O: 217-351-1430 ext. 15 | C: [REDACTED]

peterf@fox-companies.com

www.fox-companies.com

On Nov 25, 2014, at 5:24 PM, Lykins, Greg <Gregory.Lykins@busey.com> wrote:

Any counsel?

Sent from my iPad

Begin forwarded message:

From: "Marsh, Teresa" <Teresa.Marsh@busey.com>
Date: November 25, 2014 at 2:25:52 PM CST
To: "Lykins, Greg" <Gregory.Lykins@busey.com>

**Subject: Call from Karla Vandivier in Dean Michele Mariscalco's office
at the College of Medicine**

Greg,

She met with Robert Easter recently and he suggested that he have a discussion with you regarding matters involving various interests and that you would be a good resource.

Following are three dates and times that would work for her to come over here for a 45-60 minute visit:

Wednesday, December 3 at 4:00 pm
Tuesday, December 9 at 10:30 am
Tuesday, December 16 at 3:30 pm

Your calendar appears open at all of these times. Do you have a preference? Thanks. Once I know I will also book a conference room on 4th floor.

Teresa

Teresa Marsh

Assistant Vice President | Corporate Secretary
100 W. University Ave.
Champaign, IL 61820
P: 217.351.6506 | Ext:56506
C [REDACTED]
F: 217.365.4878



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<http://www.busey.com>.

<image001.jpg>

From: Phyllis Wise [REDACTED]
Sent: Wednesday, November 26, 2014 9:59 PM
To: [REDACTED] and Dan Peterso
Subject: today

Dan,

Please excuse my delay in getting back to you. Normand and I talked about our meeting and compared notes as we were being driven back to Champaign. I got home and went directly to the grocery store to start preparing for Thanksgiving. Enough excuses...

Your presentation was fantastic and totally reassured them. Our presentation was just as fine and they had no questions that we could not answer relative to any of the revenues and expenses. But we spent at least an hour and a half on how we could do this and not hurt UIC. And there was little way that we could say anything that could assuage their feelings that any harm to them would be too much harm. Close to the end, Pat said what would be ideal is if Dimitri could say that having a second medical school would be fine with him because it would help UIC in X, Y and Z ways. I told both of them that to wish that he would say this is wishful thinking. I told them that Dimitri had told me that when the BOT says that a new COM would be approved he would work with us. So the BOT has to act first. Estrada met with him a few days ago and apparently Dimitri said the same thing to him: that if a new COM were established he would work with us, but that he would be seen as a weak dean. Pat is supposed to meet with him in a week or so.

So all in all, the three of us did as much as we could. If the criteria is that we can do no harm, including emotional harm, to UIC, this will be very difficult. We really need Ed McMillan to help us out on this. Bob seems to be getting some backbone, but he is wobbly.

Thanks again for being on the phone.

Happy Thanksgiving!
Phyllis

From: Phyllis M Wis [REDACTED]
Sent: Friday, November 28, 2014 12:35 PM
To: [REDACTED]
Subject: Re: today

Dan,

I will be talking with Ed McM on December 3 by phone (we just could not find a time to meet before the Christmas holidays). When I broached the topic of endowed deanship, he said he would think about other people who could do this. I need to find a way to focus the discussion back on him. But I thought that I should also know about the other people on your list so that I can demonstrate that we have already thought about this. Can you remind me who these are. I remember [REDACTED] bring one, but I thought we were hoping she would do a substantial gift to Barbara Fiese's program.

Phyllis

Sent from my iPhone

On Nov 26, 2014, at 10:10 PM, [REDACTED] wrote:

Phyllis,
Thanks for the update. It's good to know the lay of the land.

Now go enjoy Thanksgiving!

Dan

Sent from my iPhone

On Nov 26, 2014, at 7:58 PM, Phyllis Wise [REDACTED] wrote:

Dan,

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Thanks again for being on the phone.

Happy Thanksgiving!

Phyllis

From: Phyllis M Wise [REDACTED]
Sent: Tuesday, December 02, 2014 9:47 AM
To: Normand Paquin
Cc: Adesida, Ilesanmi
Subject: Re: Impressions from yesterday

Normand

Thanks for your summary. I am out of town on Friday so won't be at the COM meeting. Please talk with Gay and let me know what I can do.

Phyllis

Sent from my iPhone

> On Dec 2, 2014, at 8:29 AM, Normand Paquin [REDACTED] wrote:
>
> Phyllis, Ade,
>
> Our faculty panel presented and briefly answered questions at the Ed Pol Committee meeting yesterday. While some positive points were made, I was far from pleased with the tone the Q&A session. I am concerned about remarks from the most vocal that seemed deliberately worded to support making tweaks to the current system as if that would solve everything and naturally lead to success for everyone. Not a single Ed Pol Committee member spoke in favor of the project. There are supporters but they seemed unwilling to engage at this point.
>
> I took overnight to reflect on the discussion. I'm going to talk to Gay as soon as I can. In my opinion, unless Gay knows about her members different from than was reflected yesterday, there is major work to do and time is really short. I see a real possibility of the need to have you meet with a number of Ed Pol members one-on-one.
>
> Are either of you planning to be at Friday's 9 AM COM meeting?
>
> Normand
>
>
>
> _____
> Dr. Normand Paquin
> Skype: normand_paquin
> Tel [REDACTED]

From: Phyllis Wise [REDACTED]
Sent: Tuesday, December 02, 2014 2:31 PM
To: Normand Paquin
Subject: Re: Impressions from yesterday

I am just about to take off for Chicago. I am on a conference call starting at 4pm. I can call you anytime before that. It will be too late to call by the time I get to CA.

You should talk with Mike D. He told me some not good stuff about Prussing and what she is doing.

The dynamic at the SEC meeting yesterday was not good. People are in a weird place right now. Hope it doesn't bleed into the COM.

Sent from my iPad

On Dec 2, 2014, at 2:21 PM, Normand Paquin <[REDACTED]> wrote:

Phyllis,
Just spent an hour on the phone with Gay. When might be a good time to talk? I'd prefer later rather than sooner.
Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Tue, Dec 2, 2014 at 10:02 AM, Phyllis M Wise <[REDACTED]> wrote:
Normand,

It's too late to do anything about it, but I wonder whether I should have been there yesterday. I asked Gay, while we were at the SEC mtg how the EdPol mtg went and she motioned so-so. Now I understand. She asked me to attend the next meeting when a vote is supposed to be taken. If you want me to talk with members of the committee, we need to figure out, with Gay, how to facilitate that.

Phyllis

Sent from my iPhone

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>

> Normand

>

>

>

>

> Dr. Normand Paquin

> Skype: normand_paquin

> Tel: [REDACTED]

From: Ilesanmi Adesida [REDACTED]
Sent: Wednesday, December 03, 2014 1:17 AM
To: Nick Burbules
Cc: Phyllis Wise; Robin Kaler
Subject: Re: You know this already, but great to see in Business Insider

Thanks, Nick. There is a companion article coming out of Engineering being pushed which women alumni who are also tech visionaries. I envisage more tech visionaries in the future if we can stand up the New COM. Many health issues lend themselves to technological solutions and I see a plethora of advances that our institution will make in this sphere. Let's hope that we have visionaries who are ready to assist in getting the COM started. I am sure that the statement in the future would be -- why did we not do this earlier! I am convinced of that. Pre-eminence demands visionaries!

Ade

On Tue, Dec 2, 2014 at 10:28 AM, Nick Burbules [REDACTED] wrote:
<http://www.businessinsider.com/uiuc-amazing-tech-visionaries-who-went-to-school-there-2014-12?op=1#ixzz3KkiuxdQc>

From: Rick Stephens <rick@investres.net>
Sent: Friday, December 05, 2014 2:47 PM
To: Phyllis Wise
Subject: Re: possible dates for a dinner with Tim Killeen

Sounds good. We'll decide based on Dr Johnson. Peter and Greg have said yes. Haven't heard yet from Jim. But we have a core group anyway. Can talk later about other possibilities.

On Dec 5, 2014, at 1:52 PM, Phyllis Wise [REDACTED] > wrote:

Rick,

It's wonderful that you are available. In terms of individuals or couples, I would be happy to inquire as to whether his wife, Roberta Johnson will be accompanying him on this trip. If she is, it would probably be good to make this couples, when possible. But if she is not, then it would probably be better to make it just the members of the external economic development advisory group. But I am totally open to your ideas. After all you are being kind enough to host this.

Phyllis

From: Rick Stephens <rick@investres.net>
To: Phyllis Wise <[REDACTED]>
Sent: Friday, December 5, 2014 1:07 PM
Subject: Re: possible dates for a dinner with Tim Killeen

Hi Phyllis,

Jan 22nd is perfect for us. If you and we can make, I say let's book it. There are several people/couples we could fill out the table with starting with the list we have down. Would you prefer couples or individuals?

On Dec 5, 2014, at 9:39 AM, Phyllis Wise [REDACTED] > wrote:

Rick,

President Killeen told me that he will be on campus on Wednesday-Friday, January 21-23. I wonder whether you will be in town and whether you would like to offer to have dinner with him during his visit. I cannot be there on January 21, but my presence is not essential. I don't know whether he will be here through the evening of January 23 - but would be happy to find out. This leaves January 22 as a sure evening that he will be here. Please let me know if you would like to propose that evening for a dinner for the group. If you are available, I am sure you will want to poll the group's availability. He has asked me to develop an itinerary for him. I will keep this evening open until I hear from you.

Although he has not said so, I suspect that he will be back in the spring for another visit. They are still negotiating on when he will actually take over.

Many thanks,
Phyllis

From: Peter B. Fox <peterf@fox-companies.com>
Sent: Friday, December 05, 2014 5:43 PM
To: Phyllis Wise
Subject: RE: Fwd: Re:

It will dec 16
I have mtg with gov rauner 12/15 and will review open issues



Peter B. Fox
Chairman
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

From: Phyllis Wise [mailto:[REDACTED]]
Sent: Friday, December 05, 2014 9:31 AM
To: Peter B. Fox
Subject: Re: Fwd: Re:

thanks so much for reaching out. I hope one of these dates works.

From: Peter B. Fox <peterf@fox-companies.com>
To: Phyllis M Wise [REDACTED]
Sent: Thursday, December 4, 2014 7:10 PM
Subject: Fwd: Re:

Fyi

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

Begin forwarded message:

From: Ed McMillan [REDACTED]
Date: December 4, 2014 at 6:56:20 PM EST
To: "Peter B. Fox" <peterf@fox-companies.com>
Subject: Re:

First, Thanks for your recent note... It is an honor to try to assist Bruce Rauner in his efforts to "right the ship" in Illinois... no easy task!!!

67Second, I am in NY attending a corporate board meeting on 12/17-18, actually traveling there on the 16th. I am coming back thru Chicago to attend a Rauner transition meeting on the 19th. I have not made my travel plans as the Rauner meeting schedule has not been finalized. One option would be to drive to Chicago on the 16th and fly to NY, returning on the night of the 18th, for the meeting on the 19th. If that happens, I might be able to meet you and Rick in Champaign on my way to Chicago. I hope to have my travel plans finalized this weekend... can we hold the AM of the 16th for a possible get together in or near Champaign?

Ed McMillan
McMillan L.L.C.
105 North 3rd St., Suite 204
Greenville, IL 62246
618-664-9600
Cel [REDACTED]
[REDACTED]

On Dec 4, 2014, at 5:15 PM, Peter B. Fox <peterf@fox-companies.com> wrote:

Ed I was wondering if you might have time for lunch dec 16 17 or 18

Rick Stephens and I could meet you in your area

Sent from my iPhone

Peter B. Fox

1909 Fox Drive
Champaign, IL 61820

O: 217-351-1430 ext. 15 | C: [REDACTED]

peterf@fox-companies.com

www.fox-companies.com

From: Phyllis Wise [REDACTED]
Sent: Tuesday, December 09, 2014 5:48 AM
To: Ilesanmi Adesida
Subject: Re: Comment on support

Ade,

I think a conversation between you and Jeff would be very helpful. He's got to understand that the train has left the station and it does not help to be such a naysayer. It just is not helpful. Maybe when he sees the risk management document he will feel better. But it might just make him more intransigent.

Phyllis

Sent from my iPad

On Dec 7, 2014, at 12:23 PM, Ilesanmi Adesida [REDACTED] wrote:

Did Mike Sandretto change his tune?

I will need to talk with Jeff Brown to see what his whole beef is about.

Ade

On Sun, Dec 7, 2014 at 12:09 PM, Phyllis Wise [REDACTED] > wrote:
Normand,

You probably know that Jeff Brown read the business plan and was quite critical. I am not sure we have done anything to allay his fears. I am not sure whether there are others who might be a fresh set of eyes.

Phyllis

Sent from my iPad

On Dec 7, 2014, at 12:41 PM, Normand Paquin <[REDACTED]> wrote:

Will do. Thank you Ade.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Sun, Dec 7, 2014 at 11:40 AM, Ilesanmi Adesida [REDACTED] > wrote:

Normand,

I have not talked to him lately about CO but I am sure that he supports the NewCOM. You can send him an email and copy me that you want to see him about the NewCOM.

Thanks.

Ade

On Sun, Dec 7, 2014 at 11:37 AM, Normand Paquin
[REDACTED] wrote:

Phyllis, Ade,

Can you comment on the support you have received from Larry DeBrock for the College of Medicine? If the support has been strong, I would be willing to approach him (I know him reasonably well from my days in the College of Business) to identify one or two highly respected faculty members who could review, strengthen and validate the Risk Analysis and Management Plan.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel [REDACTED]

From: Phyllis Wise [REDACTED]
Sent: Tuesday, December 09, 2014 2:48 PM
To: Peter B. Fox
Cc: Lykins, Greg; James Leonard; Habeeb Habeeb (habeeb@bpcinc.com); Rick Stephens
Subject: Re: Just letting you know ..

I'd love to know as well. I am meeting with the UIC COM faculty who are in Urbana later this week. I'll let you know how that goes.

Sent from my iPad

On Dec 9, 2014, at 12:28 PM, "Peter B. Fox" <peterf@fox-companies.com> wrote:

How did it go

Sent from my iPhone

Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

On Dec 9, 2014, at 10:22 AM, Lykins, Greg <Gregory.Lykins@busey.com> wrote:

Hello Folks,

As I have previously mentioned, Rick and I are meeting with this lady at 10:30 am today at the bank.

http://www.medicine.uic.edu/news/appointments/dr_michele_mariscalo

Not sure the purpose for the meeting other than Bob Easter apparently suggested she meet with us.

If you have any last minute thoughts on the subject, let us know. We will let you know if we learn anything.

Thanks,

Greg

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From: Lykins, Greg <Gregory.Lykins@busey.com>
Sent: Tuesday, December 09, 2014 7:51 PM
To: Rick Stephens; Phyllis M Wise; Habeeb Habeeb; James Leonard; Peter Fox
Subject: Crain's -- fyi ...

<http://www.chicagobusiness.com/article/20141209/BLOGS11/141209746?template=printart>

Sent from my iPad

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<http://www.busey.com>.

From: Peter B. Fox <peterf@fox-companies.com>
Sent: Tuesday, December 09, 2014 8:28 PM
To: Lykins, Greg
Cc: [REDACTED] James Leonard; Habeeb Habeeb (habeeb@bpcinc.com); Meyer, Chris; Rick Stephens
Subject: Re: Report on our visit

Thanks

Sent from my iPhone

Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
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Michele was a very pleasant respectful individual with lots of spunk. She indicated that she did not have an agenda but then proceeded to reflect on her perceptions of the idea of a new medical school at Urbana-Champaign. She intimated that she is not so confident that a new separate medical school would meet the expressed expectations. She indicated that there is already a significant amount of collaboration between the existing medical school and the engineering department. She referenced that what is going on within the existing medical school is not well known and is under appreciated.

She referenced that unlike Peoria and Rockford, the Urbana based medical school has not been embraced by the local community, especially Carle. She also referenced that because of the size of the community, it is quite difficult to support a medical school.

After a considerable amount of dialogue, she said on several occasions "it's all about the campus", meaning, I think, that the issue is largely political. She referenced that if a new medical school is opened, the existing medical school in Urbana-Champaign will be closed (and inferred without saying it, that she would be out of a job). She also lamented that it is unfortunate that the separate campuses don't cooperate better.

I think President Easter wanted us to hear exactly what the Chicago campus is saying to him ... that we already have a medical school and it is working well, so why start another?

Rick and I did our best to counter about every argument. She politely disagreed on several items . We departed on a positive note hoping whatever will happen will be in the best interests of the University of Illinois as a whole.

Rick, please add any thoughts you have if any of you have any questions, please let us know.

Thanks,

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From: Habeeb Habeeb <habeeb@bpcinc.com>
Sent: Tuesday, December 09, 2014 10:49 PM
To: 'Lykins, Greg'; James.Leonard
Cc: [REDACTED]; Peter B. Fox; Meyer, Chris; Rick Stephens
Subject: RE: Report on our visit

Thank you for taking the time to speak with her and for your report

Habeeb Habeeb
www.bpcinc.com

From: Lykins, Greg [mailto:Gregory.Lykins@busey.com]
Sent: Tuesday, December 09, 2014 9:34 PM
To: James.Leonard
Cc: [REDACTED]; Peter B. Fox; Habeeb Habeeb; Meyer, Chris; Rick Stephens
Subject: Re: Report on our visit

Dr. L,

We concur with you .. of course.

She really is a "newbie" . . .

GBL

Sent from my iPad

On Dec 9, 2014, at 9:11 PM, James.Leonard <James.Leonard@Carle.com> wrote:

Interesting- thanks for meeting with her and spending the time. She is a little/lot off in her history but I understand her dilemma.

Jim

Sent from my iPad

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From: Phyllis Wis [REDACTED]
Sent: Wednesday, December 10, 2014 6:11 AM
To: Ilesanmi Adesida
Subject: Fw: Report on our visit

Number #2

----- Forwarded Message -----

From: James. Leonard <James.Leonard@Carle.com>
To: "Lykins, Greg" <Gregory.Lykins@busey.com>
Cc: [REDACTED] <[REDACTED]>; Peter B. Fox <peterf@fox-companies.com>; "Habeeb Habeeb" <habeeb@bpcinc.com> <habeeb@bpcinc.com>; "Meyer, Chris" <cmeier@oktocom.com>; Rick Stephens <rick@investres.net>
Sent: Tuesday, December 9, 2014 9:11 PM
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From: Phyllis Wis [REDACTED]
Sent: Wednesday, December 10, 2014 6:12 AM
To: Ilesanmi Adesida
Subject: Fw: Report on our visit

Last

----- Forwarded Message -----

From: "Lykins, Greg" <Gregory.Lykins@busey.com>
To: James Leonard <James.Leonard@Carle.com>
Cc: [REDACTED] <[REDACTED]>; Peter B. Fox <peterf@fox-companies.com>; "Habeeb Habeeb" (habeeb@bpcinc.com) <habeeb@bpcinc.com>; "Meyer, Chris" <cmeier@oktocom.com>; Rick Stephens <rick@investres.net>
Sent: Tuesday, December 9, 2014 9:34 PM
Subject: Re: Report on our visit

Dr. L,

We concur with you .. of course.

She really is a "newbie" . . .

GBL

Sent from my iPad

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From: Phyllis Wise [REDACTED]
Sent: Wednesday, December 10, 2014 6:13 AM
To: Lykins, Greg; James. Leonard
Cc: Peter B. Fox; Habeeb Habeeb (habeeb@bpcinc.com); Meyer, Chris; Rick Stephens
Subject: Re: Report on our visit

Greg and Rick,

Thanks so much for taking the time to visit and for your report. Ade and I will be ready for our visit with her and her faculty.

Phyllis

From: "Lykins, Greg" <Gregory.Lykins@busey.com>
To: James. Leonard <James.Leonard@Carle.com>
Cc: [REDACTED] Peter B. Fox <peterf@fox-companies.com>; "Habeeb Habeeb" (habeeb@bpcinc.com) <habeeb@bpcinc.com>; "Meyer, Chris" <cmeyer@oktocom.com>; Rick Stephens <rick@investres.net>
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From: Phyllis Wise [REDACTED]
Sent: Wednesday, December 10, 2014 12:34 PM
To: Ilesanmi Adesida
Subject: Fw: Report on our visit

Another email.

----- Forwarded Message -----

From: Rick Stephens <rick@investres.net>
To: "Lykins, Greg" <Gregory.Lykins@busey.com>
Cc: [REDACTED] Peter B. Fox <peterf@fox-companies.com>; James Leonard <James.Leonard@Carle.com>; "Habeeb Habeeb (habeeb@bpcinc.com)" <habeeb@bpcinc.com>; "Meyer, Chris" <cmeier@oktocom.com>
Sent: Wednesday, December 10, 2014 8:20 AM
Subject: Re: Report on our visit

Greg paints the picture well. It was very enlightening although I do get slightly frustrated when faced with 1 track vs free thinkers. Greg of course was the perfect gentleman and I restrained myself such that she may even have left thinking she scored meaningful points toward helping us understand her point of view. She is spunky. I like her personality. Fun meeting actually in spite of differences.

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From: Phyllis Wis [REDACTED]>
Sent: Wednesday, December 10, 2014 12:45 PM
To: Ilesanmi Adesida
Subject: Fw: Report on our visit

----- Forwarded Message -----

From: James. Leonard <James.Leonard@Carle.com>
To: "Lykins, Greg" <Gregory.Lykins@busey.com>
Cc: [REDACTED] " " <[REDACTED]>; 'Peter B. Fox' <peterf@fox-companies.com>; "Habeeb Habeeb (habeeb@bpccinc.com)" <habeeb@bpccinc.com>; "Meyer, Chris" <cmeyer@oktocom.com>; 'Rick Stephens' <rick@investres.net>
Sent: Wednesday, December 10, 2014 8:42 AM
Subject: RE: Report on our visit

I should add so everyone knows- we have met with her numerous times since her arrival and Matt Gibb has regular meetings with her and I attend periodically. The last joint meeting was in November. I met with her predecessor monthly during his 2+ year interim service and as most of you know he was one of our MDs (Dr. Oliphant- one our trauma surgeons) who now is on the Carle Board of Trustees.

Jim

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From: Phyllis Wise [REDACTED]
Sent: Wednesday, December 10, 2014 3:55 PM
To: Rick Stephens
Cc: Peter B. Fox; Jim Leonard; Greg Lykins; Habeeb Habeeb; [REDACTED]
Subject: Re: Dinner with Dr. Killeen

Dear Rick,

Thank you again for your gracious offer to host a dinner, which I am sure will be fun and a great start to relationship building between the great leaders of our community and the new president. And just remember that the designation of "Dr." doesn't insure being smart, particularly PhD is thought to be the acronym for "piled higher and deeper".

Looking forward to a great evening,
Phyllis

Sent from my iPad

> On Dec 10, 2014, at 3:11 PM, Rick Stephens <rick@investres.net> wrote:
>
> Dr. Killeen has confirmed he will be able to attend the dinner on January 22nd so I think we're pretty well set. Phyllis will include it on Dr. Killeen's itinerary for his visit and coordinate on the University end. Chris and [REDACTED] will be in [REDACTED] so they will not be able to make it unfortunately. But it appears the rest of us can make it. General details at this point are:
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>
> Tentatively 6 PM although Phyllis' schedule for him will dictate the time in the end
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> Attending will be: Dr. Timothy Killeen (his wife Dr. Roberta Johnson will be arriving too late that evening to make it)
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> Habeeb and [REDACTED] Habeeb
> [REDACTED] and Rick
>
> (Lot of doctors here - I apologize to any named who have a doctorate but are not so recognized) (I love being around smart people!)
>
> One thought is to invite Laura Frerichs to join us since she's heavily involved in U of I Research Park and the evolving COM. What do you all think?
>
> We are planning it to be a business casual, relaxing time for us to get to know each other and give Dr. Killeen some background on the community. As we get closer to the event we will tweak the details as need be. [REDACTED] and I are open to suggestions to make the event most enjoyable and helpful.
>
> Thanks for joining us! I think it will be great fun.
>
> Rick

>
>
>

From: Phyllis Wise [REDACTED]
Sent: Wednesday, December 10, 2014 3:57 PM
To: Rick Stephens
Subject: Re: Dinner with Dr. Killeen

Rick,

How can I ask you for one more thing, when you have offered so much, but I wonder whether you would like to add Laura Frerichs. It is totally up to you - Peter had offered it as a suggestion and I thought I would raise it as a possibility.

Best,
Phyllis

Sent from my iPad

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From: Peter B. Fox <peterf@fox-companies.com>
Sent: Wednesday, December 10, 2014 4:11 PM
To: Phyllis Wise
Cc: Lykins, Greg; James Leonard
Subject: Re: Effort to communicate

I have high regard for andreas

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C [REDACTED] peterf@fox-companies.com www.fox-companies.com

> On Dec 10, 2014, at 4:47 PM, Phyllis Wise [REDACTED] wrote:

>
> Dear Greg,
>
> Sounds like a great group to have for dinner. I am sure you will have a wonderful time.

>
> Best,
> Phyllis
>

> Sent from my iPad

>> On Dec 10, 2014, at 1:30 PM, "Lykins, Greg" <Gregory.Lykins@busey.com> wrote:

>>
>> Hi Folks,
>>
>> Just to keep you informed ...
>>
>> Coincidentally, Donna Green and I had previously scheduled a "Busey Relationship" dinner this Friday with our spouses and Engineering Dean Andreas and [REDACTED] Cangellaris. As it turns out, I invited Rick and [REDACTED] Stephens and [REDACTED] to this dinner. I thought it would be good for Rick to know and communicate with Andreas and Paul knows [REDACTED] Andreas and is a graduate of the U of I College in Engineering.

>>
>> I just thought I would mention this to you to keep you all informed and to solicit any counsel for items to discuss with Andreas.

>>
>> Let me know if you have any suggestions.
>>
>> Thanks,
>>
>> Greg
>>
>>
>> Sent from my iPad

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Sent: Wednesday, December 10, 2014 4:45 PM
To: 'Lykins, Greg'; 'Phyllis M Wise'; 'Peter Fox'
Subject: RE: Effort to communicate

Hey Greg
You guys will have a great time and he will be very engaged around the COM here.
Jim

-----Original Message-----

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From: Habeeb Habeeb <habeeb@bpcinc.com>
Sent: Wednesday, December 10, 2014 7:21 PM
To: Habeeb Habeeb; Phyllis M Wise; Greg Lykins; Jim Leonard; Rick Stephens; Peter B. Fox
Subject: Re: odneyDavis named chairman of Subcommittee on Biotechnology, Horticulture, and Research

Sorry hit snd too quickly as they were calling my flight. He is becoming more influential and he mentions the UofI in his quote. We will keep working to make sure he keeps viewing the university in a very favorable light

Sent wirelessly

On Dec 10, 2014, at 7:08 PM, Habeeb Habeeb <habeeb@bpcinc.com<<mailto:habeeb@bpcinc.com>>> wrote:

This is good for the COM

[https://pbs.twimg.com/profile_images/3087862338/4fc4c9aca6ff76b965392bb88b677e70_normal.jpeg] US Rep Rodney Davis (@RodneyDavis<<https://twitter.com/rodneydavis?refsrc=email&s=11>>)
12/10/14, 7:02 PM<<https://twitter.com/rodneydavis/status/542846952132841473?refsrc=email&s=11>>
Proud to be named Chairman of the Subcommittee on Biotechnology, Horticulture, and Research for the 114th Congress. [rodneydavis.house.gov/news/documents...<http://t.co/rEKVfwwDp0>](http://t.co/rEKVfwwDp0)

Download the official Twitter app here<https://twitter.com/download?ref_src=MailTweet-iOS>

Sent wirelessly

From: Ilesanmi Adesida [REDACTED]
Sent: Thursday, December 11, 2014 1:42 AM
To: Phyllis Wise
Subject: Re: Fw: Report on our visit

Phyllis,

Thanks. I know that she objects to the NewCOM. The problem is that she is some of the meetings at COD and I bet she goes to Chicago to tell them what is going on here.

Ade

On Wed, Dec 10, 2014 at 6:10 AM, Phyllis Wise [REDACTED] wrote:
Ade,

I am going to forward a few emails to you so that we are both prepared for our COM meeting on Thursday.

Phyllis

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To: [REDACTED] <[REDACTED]>; Peter B. Fox <peterf@fox-companies.com>; James Leonard <James.Leonard@Carle.com>; "Habeeb Habeeb" <habeeb@bpcinc.com> <habeeb@bpcinc.com>; "Meyer, Chris" <cmeyer@oktocom.com>
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Not sure the purpose for the meeting other than Bob Easter apparently suggested she meet with us.

If you have any last minute thoughts on the subject, let us know. We will let you know if we learn anything.

Thanks,

Greg

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From: Ilesanmi Adesida [REDACTED]
Sent: Sunday, December 14, 2014 3:23 PM
To: Phyllis Wise
Subject: Re: Fw: Dinner with Dean Andreas Cangallaris

Phyllis,

Thanks. The Professors being wooed by John Hopkins are [REDACTED] and his wife, [REDACTED]. [REDACTED] Andreas has talked to [REDACTED] and he is putting a plan together to retain them. The major problem is that John Hopkins promised to pay all the tuition of their [REDACTED] children! That amount can run a reasonable department here for a year! Well, we will put something together. They are both in the bio areas and we don't want to lose people any more.

I am not surprised that UIC is already talking to Tim Killeen. We will have to counter that. UIC is not talking about how to strengthen themselves but how they are threatened by UIUC! I do like what you said that our campus is threatened more by the financial condition of the State rather than the financial condition of Carle. I hope that Tim will have an open mind. I also hope that Bob will have an open mind and make sure that the future of UIUC is very bright.

Cheers,

Ade

On Sat, Dec 13, 2014 at 11:55 AM, Phyllis Wise [REDACTED] wrote:
FYI.

----- Forwarded Message -----

From: Phyllis Wise <[REDACTED]>
To: "Lykins, Greg" <Gregory.Lykins@busey.com>; Peter B. Fox <peterf@fox-companies.com>; Rick Stephens <rick@investres.net>; James Leonard <James.Leonard@Carle.com>; Habeeb Habeeb <habeeb@bpcinc.com>; "Meyer, Chris" <cmeier@oktocom.com>
Sent: Saturday, December 13, 2014 11:54 AM
Subject: Re: Dinner with Dean Andreas Cangallaris

Thanks Greg, for your report. I am sure you had a great dinner. Andreas is one of our finest deans, if not the finest. He is such a strong academic and administrative leader for the College of Engineering and has the future of the whole campus always on his radar screen. I am glad you got to know him and [REDACTED] better. And yes, the competition for our best faculty is fierce. Private universities have an inherent advantage because their financial resources seem limitless. What we have to offer is an incredibly collaborative and interdisciplinary culture and a real density of great faculty. We just need to continue to recruit and retain the very best. It is key to the future of the university.

Best,
Phyllis

P.S. I just met President-designate Killeen for the first time. He is really drinking out of a fire hose. Everyone is telling him about how important their part of the mission is. The UIC folks have already filled him with their perspective on the COM and why we do not need one and how it will weaken them. It apparently came up in the interviews for the Chancellor for UIC, which he and Bob Easter were involved with. He asked what would happen if something happened to Carle. I explained that Carle is not only on a great financial foundation, but that the MOU outlines that their commitment to our partnership stands even if they acquire another entity or are acquired. I told him that I actually fear for our financial stability if the state cuts our budget as has been proposed, more than I fear for Carle's financial stability. There will be a lot to talk about on January 22nd at our dinner.

From: "Lykins, Greg" <Gregory.Lykins@busey.com>
To: Peter B. Fox <peterf@fox-companies.com>; Rick Stephens <rick@investres.net>; Phyllis M Wise
[REDACTED]; James Leonard <James.Leonard@Carle.com>; Habeeb Habeeb
<habeeb@bpcinc.com>; "Meyer, Chris" <cmeyer@oktocom.com>
Sent: Saturday, December 13, 2014 9:26 AM
Subject: Dinner with Dean Andreas Cangallaris

Just reporting in ..

Rick and I and our wives had dinner last evening with Dean Andreas Cangallaris (Engineering) and his wife [REDACTED] Donna Greene (Chairman of Carle Foundation) and her husband, [REDACTED] also joined us . . . as did [REDACTED] We had a great time and there was lots of conversation about the COM. Obviously, Andreas is very enthusiastic about the need and importance of the medical school. He recounted a conversation that he had yesterday with one of his star professors who is being highly recruited by Johns Hopkins who is offering to pay for his [REDACTED] children's college education anywhere they might attend. That is an example of the competitive environment this extraordinary college is being subjected to.

Have a great weekend,

Greg

The information contained in this e-mail is privileged and confidential. Unless otherwise indicated or obvious from the message, this is intended only for the individual(s) listed above. Please see our Privacy Notices at <http://www.busey.com>.

From: Phyllis M Wise [REDACTED]
Sent: Tuesday, December 16, 2014 11:50 AM
To: Normand Paquin
Subject: Re: Interested in Continuing our Assistance to UIUC from January through March 2015

Normand

I already spoke with him and told him that we would not be pursuing anything with them.

Phyllis

Sent from my iPhone

On Dec 16, 2014, at 7:55 AM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

Do I need to send Paul a formal reply or have you spoken to him about this? As we discussed, we will not pursue a supplemental engagement at this time all the while wishing to keep the door open to such an engagement if we determine it is worthwhile. I spoke to Beth. She concurs.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED]

----- Forwarded message -----

From: **Phyllis Wise** [REDACTED] <m>

Date: Sat, Nov 22, 2014 at 5:05 PM

Subject: Re: Interested in Continuing our Assistance to UIUC from January through March 2015

To: Paul Umbach <PUMBACH@trippumbach.com>

Cc: "Normand Paquin ([REDACTED])" <[REDACTED]>, Beth Paul

<BPAUL@trippumbach.com>, "Laura Frerichs ([REDACTED])" <[REDACTED]>

<HPHAM@trippumbach.com>

Paul,

I have been meaning to call you to give you an update on where we are and our next steps. It's been an absolutely crazy time. I promise I will call tomorrow.

Phyllis

From: Paul Umbach <PUMBACH@trippumbach.com>

To: " [REDACTED]" <[REDACTED]>

Cc: "Normand Paquin ([REDACTED])" <[REDACTED]>;

Beth Paul <BPaul@trippumbach.com>; "Laura Frerichs ([REDACTED])"

<[REDACTED]> Ha Pham <HPham@trippumbach.com>

Sent: Saturday, November 22, 2014 4:24 PM

Subject: Interested in Continuing our Assistance to UIUC from January through March 2015

Dear Phyllis:

First, we have enjoyed our partnership and friendship with your team this year. As we get closer to the completion of our business plan assignment, I want to offer our assistance as you move forward in the uncertain waters in January through March when the President (who knows who) will be developing a report for the Chair of the Board (again, who knows who).

What we DO know is that you have a great plan for a game changing College of Medicine that will transform your university and the state. I am confident that Tripp Umbach's continued assistance through a contract extension will be valuable as you receive additional requests for information and analysis during this critical period.

I chose to email you on your personal email because I want to "test the waters" with my proposal privately. Please understand that we are 100% open and excited to also help Carle Health System during this period, but I would like the idea of continuing to use our services (if you feel this way of course) to come from you Phyllis. I do not believe that the other consulting firm can alone meet your collective needs.

I see Tripp Umbach as being able to provide the UIUC with horsepower and expertise in accreditation, curriculum refinement, business model sensitivity analysis, interface with System level consultants who the President will hire, interface with proposals from UIC and their consultants, further financial and fundraising analysis, preliminary search process for a founding dean, etc. My reading of the Nov 13th board resolution is that things are likely to get very busy by the end of March as many new questions about your plans will be raised.

Thank you Phyllis of your consideration of my request to discuss and develop a potential contract extension for the period January 1, 2015 through March 31, 2015. Beth, Ha and I are very committed to the ultimate success of your school and as such want to continue as members of your team. I copied your team and mine on this email to keep everyone in the loop.

Sincerely yours,

Paul

***Paul O. Umbach
Founder and President***

Tripp Umbach

2359 Railroad St. #3701

Pittsburgh, PA 15222

Corporate Headquarters: 412.281.2313

Cell Number: [REDACTED]

Fax Number: 412.281.9946

www.trippumbach.com

“Turning ideas into action for 25 years”

From: Phyllis M Wise [mailto:
Sent: Tuesday, December 16, 2014 5:33 PM
To: James.Leonard
Subject: Re: Urbana

Thanks, Jim. I'm eager to learn more when you have the info Mayo and Rochester.

I/we are so excited that your board has given the green light. I am sure that our faculty will get there. Right now the COM is getting a bit mixed up with the unionization issue, the Saleita issue and the state budget issue. But the leaders of the committee are handling things well.

We are sending in a proposal to the Beckman Fdn. Ade visited the [REDACTED] last week and we will prepare a proposal for them. I visited a potential donor in NY last week and one today. We'll see...I hope we will have something in writing by the March BOT. They cannot turn down your \$100M and any progress we make toward funding on our part.

I think the momentum is really building. Prussing and a few of the faculty (and UIC) are just distractions.

Best,
Phyllis

Sent from my iPhone

On Dec 16, 2014, at 4:14 PM, James.Leonard <James.Leonard@Carle.com> wrote:

Phyllis

Hope that things are going well. Really appreciate the route that you took with the Mayor. I was so excited to pass on my board's decisions- they are "all in". Out of curiosity I checked out the Mayor's comments about Mayo and the city of Rochester. As is typical it is inaccurate. I have an article that explains the situation and they actually do the same thing we do ☺

In addition apparently the state and community made a major capital pledge for infrastructure in the last 3 years- I am getting more information.

Anyhow just wanted to touch base.

Best
Jim

From: Phyllis Wise [mailto:
Sent: Friday, December 12, 2014 4:36 PM
To: James.Leonard
Subject: Re: Urbana

Jim,

Mike DeLorenzo and I met with Mayor Prussing today. It was basically a non-meeting. She knew that I would not participate in any public forum. So she did not even really demand/ask me to do it. She re-iterated that Urbana is seriously disadvantaged from a tax perspective because Carle does not pay taxes - we did not comment. We went into the airport and the high school basketball tournament and how she could not contribute to either because Urbana did not have the tax base. We did not comment. She apparently has asked Mayo to buy Carle because she thinks they would be willing to pay local taxes (she said they do to Rochester, MN). I did not comment. Clearly she believes that all of her problems would be solved if Carle would pay taxes. It was a bit of a meandering conversation...

We gave her no ammunition to continue her criticism of Carle with any support from us. But because stories can get twisted, I just wanted you to know that we made it clear that we would not participate in any conversation about Carle and the city of Urbana.

Phyllis

From: James. Leonard <James.Leonard@Carle.com>
To: 'Phyllis Wise' <[REDACTED]>
Sent: Wednesday, December 10, 2014 2:57 PM
Subject: RE: Urbana

Thanks Phyllis.

We would be happy to meet with her. Please go ahead and make the introduction and we will follow-up.

Jim

From: Phyllis Wise <[REDACTED]>
Sent: Wednesday, December 10, 2014 12:45 PM
To: James.Leonard
Subject: Re: Urbana

Jim,

Don't worry - I know exactly where she is coming from and that she does not have the leadership qualities or the vision to understand how partnering with you would enhance the future of Urbana. Mike DeLorenzo and I will be meeting with her. We intend to listen and not to comment or endorse her resolution, but instead to encourage her to work with you.

On a slightly different front, [REDACTED] came up to me after our Transformational Leadership meeting. She told me that she would really like to understand the other side of the argument about Carle and Urbana. You probably remember that she was the person who we thought about putting on our External Economic Development advisory committee. I haven't done it because I felt that the group was working so well together that I did not want to introduce another person to the group. But I really think it would be worthwhile for you and Steph to meet with her. She is a sane and open mind. If you are willing, I will do an e-introduction and let you schedule a time to meet. I would be happy to be there so that I can learn as well.

But to your original point, you do not need to be concerned at all.

Phyllis

From: James. Leonard <James.Leonard@Carle.com>
To: [REDACTED]
Sent: Wednesday, December 10, 2014 11:15 AM
Subject: Urbana

Phyllis

I am aware that you are meeting with the mayor of Urbana per the newspaper report of the city council meeting. I know as Chancellor that the meeting needs to occur. I just want to express my concern [REDACTED]

[REDACTED] You are incredibly reasonable and balanced in your responses but [REDACTED]

Thank you.

Jim

From: Ilesanmi Adesida [REDACTED]
Sent: Wednesday, December 17, 2014 1:18 AM
To: Phyllis Wise
Subject: Re: [REDACTED]

Phyllis,

I wish we could get over \$25M from [REDACTED] I know that he wants to build [REDACTED] I wonder whether we could present a proposal \$40M to him; build a smaller [REDACTED] here for \$25M and \$10M endowment to run it as part of the NewCOM and \$5M contribution directly to NewCOM operation. He has the capacity and we could let him do this over 5 years. I have thought about this.

Ade

On Tue, Dec 16, 2014 at 9:43 PM, Phyllis Wise [REDACTED] <[REDACTED]> wrote:

Dear Dan, Leanne, and Molly and Ade,

This report is long.

The best part of my day was that I met with [REDACTED] at his place. He showed me around and told me about his business (i.e. he does best when there is volatility - he must have had a good day today). I am amazed that he started this in [REDACTED] less than 20 years ago. He is global. He pointed out that the facility at the Research Park is the first time that he is setting up a facility as a site to basically interview students who could become his employees as well as a site where they actually do trading.

I told all about the COM, gave him the TU report, the support letters with the cover summaries, and the FAQs. I had a chance to go over in detail why it is unique, why Andreas and we believe that we have to do this for the future of the COE, the campus, Chicago, the state, why is complements UIC in every way, how UIC COM at Peoria will be fine with this, why Carle was the best partner, but that we would be partnering with OSF, the VA, etc (he clearly had heard from [REDACTED] that Carle was not an appropriate partner). He asked about UIC COM at Peoria - and I reassured him that we plan to continue to teach the M1 year - so no impact on UIC COM Peoria. Interestingly he was reading the UIC counter proposal on his monitor when I got there. And he had an amazing organizational chart on his white board that he had drawn for his person who will head up the [REDACTED] in the Research Park. It was amazingly accurate. It had UIUC, UIC, Peoria, UA (including Tim Killeen's name) - I was really impressed. So I could use his white board to explain what we were doing with our COM and why it was unique, how Carle had committed \$100M (he was impressed). I told him that I was starting to raise \$200M for the COM and that we were putting in proposals to foundations and were beginning to approach individual donors.

After all this, he said that he has to talk more with [REDACTED] but that he wants to start a [REDACTED] as part of our COM. He said that he needs to make sure that it complements what is in [REDACTED] and does not compete with it. We talked about the fact that the one in [REDACTED] like the one in [REDACTED] but would have to be a few thousand square feet. He explained that they are always worried that if we had [REDACTED] that it would compete for our attention with the one in [REDACTED] which is clearly where he has [REDACTED]. He said that he sees this as a place that will synergize with the [REDACTED] reassured him that we would never withdraw our attention from the [REDACTED] - he will want to put this in any future gift since he said that Chancellors, Provosts, and Deans come and go.

Bottom line is that he would like to make a gift to build [REDACTED] as part of our COM. I said that part of the funds would need to go to build out the facility and that part of it should go into an endowment for the operations of the center. I told him that it would be critical that his gift be to the UIUC COM, and not transferrable to UIC, just like the Carle \$100M is not transferrable. I pointed out that his gift to Peoris is attributed to UIC, but I did not want to go into too much detail on this. We just need to pay attention to this. I told him that it would be wonderful if we could get an agreement before the March BOT meeting to demonstrate that our goal of raising \$200M is not unreasonable. He said that was reasonable. I told him that I would let Molly know and that she could work with him on writing a proposal that could hopefully be signed before March.

I also met with [REDACTED] the co-founder of [REDACTED] healthcare start-up. He is an Illinois alum and has hired several Illinois alums. They invest in health-related researchers. Interestingly, part of their company is funded by BC-BS's umbrella HCHS. They know people in the health arena and he said that he would be happy to introduce me to them. I don't know where this might lead to, but it is worth following up. I told him that I would let him know the next time I am in Chicago.

I also met with [REDACTED] He is still [REDACTED] When I probed why, it is basically because he is not warm and fuzzy. I am convinced that [REDACTED] He said that he had gotten a list of people from Travis, but did not really understand the context. He said he would call him and find out. He asked whether we had thought about the advisory group that Dan and I had talked about. I told him that I was counting on Dan to come up with a list of Chicago people/influencers who would make up a good advisory group. We talked about a campaign and what it would really need: multiple \$100-200M donors - he said that we don't have those kinds of people in Chicago, Two important things: (1) He reiterated that he would get a luncheon with [REDACTED] - said that he would check with [REDACTED] to see whether he thought that we should do them together. (2) He said that he would be happy to organize a TL luncheon (12-15 people). He said that he thought a lunch would be better than a dinner because people are already in town. He said that people don't like to give up their evenings. Please share this part of the report with Travis.

Phyllis

From: Phyllis Wise [REDACTED]
Sent: Wednesday, December 17, 2014 5:56 AM
To: Ilesanmi Adesida
Cc: [REDACTED] and Dan Peterso; LRC; Molly Tracy
Subject: Re: [REDACTED]

Ade,

All of this is great info. I don't know how much money and where we would put the [REDACTED] but I did say that part of it would need to go into an endowment to help to operate it - he did not flinch.

I've met [REDACTED] keeps on saying his son is the one with the money. The son is the one who really wanted us to apply for a grant a while back that Brian White helped to write with us, UIC and his company. But I don't know what came of it.

Phyllis

From: Ilesanmi Adesida [REDACTED]
To: Phyllis Wise <[REDACTED]>
Cc: [REDACTED] and Dan Peterso [REDACTED]; LRC <[REDACTED]>; Molly Tracy
Sent: Wednesday, December 17, 2014 1:14 AM
Subject: Re: [REDACTED]

Dear Phyllis,

Thanks for the comprehensive report. I am glad that [REDACTED] is coming around. I believe that the continued success of the [REDACTED] is crucial to engaging [REDACTED] fully in Champaign and to support the NewCOM. I discussed with [REDACTED] a while back about the possibility of a [REDACTED] in Champaign, albeit smaller than the one in Peoria, he did not flinch at all. At that time, we had not hired Kesh, the Engineering lead of the collaborations with Peoria but now that he is on board and movement in the projects are visible, I believe that [REDACTED] will be supportive. He is an adjunct faculty in BioE here. We may get Kesh, Rashid, and Andreas to start thinking of areas that are complementary to what is going on in Peoria. No matter what we do though, both [REDACTED] and Sarah Rusch will feel threatened by an [REDACTED] here. We have to keep reassuring them that we are in the game for the long-term even when this Chancellor, Provost, and Dean are long gone!

[REDACTED] company is international already, he has offices in [REDACTED] and [REDACTED] and I think he wants to expand to South America. I visited his office in [REDACTED] last year even before he went there! I hope he showed you the Green Room in his Chicago Office. This is the recovery (sleeping) room for his workers with migraines! I suppose you get this after spending days glued to a screen. He does have excellent workers, eager kids from the top schools.

I spoke with [REDACTED] a couple of days ago in my office. We talked about his son's new company in Chicago. He was excited about the NewCOM and he said that it is something that they would like to contribute to. We need to work with him somehow. His son sold his previous company in [REDACTED] for over a \$100M. So there is something there. His son is a [REDACTED] grad from here. Need some exploration.

Thanks.

Ade

On Tue, Dec 16, 2014 at 9:43 PM, Phyllis Wise [REDACTED] wrote:

Dear Dan, Leanne, and Molly and Ade,

This report is long.

The best part of my day was that I met with [REDACTED] his place. He showed me around and told me about his business (i.e. he does best when there is volatility - he must have had a good day today). I am amazed that he started this in [REDACTED] less than 20 years ago. He is global. He pointed out that the facility at the Research Park is the first time that he is setting up a facility as a site to basically interview students who could become his employees as well as a site where they actually do trading.

I told all about the COM, gave him the TU report, the support letters with the cover summaries, and the FAQs. I had a chance to go over in detail why it is unique, why Andreas and we believe that we have to do this for the future of the COE, the campus, Chicago, the state, why is complements UIC in every way, how UIC COM at Peoria will be fine with this, why Carle was the best partner, but that we would be partnering with OSF, the VA, etc (he clearly had heard from [REDACTED] that Carle was not an appropriate partner). He asked about UIC COM at Peoria - and I reassured him that we plan to continue to teach the M1 year - so no impact on UIC COM Peoria. Interestingly he was reading the UIC counter proposal on his monitor when I got there. And he had an amazing organizational chart on his white board that he had drawn for his person who will head up the [REDACTED] in the Research Park. It was amazingly accurate. It had UIUC, UIC, Peoria, UA (including Tim Killeen's name) - I was really impressed. So I could use his white board to explain what we were doing with our COM and why it was unique, how Carle had committed \$100M (he was impressed). I told him that I was starting to raise \$200M for the COM and that we were putting in proposals to foundations and were beginning to approach individual donors.

After all this, he said that he has to talk more with [REDACTED] but that he wants to start a [REDACTED] as part of our COM. He said that he needs to make sure that it complements what is in [REDACTED] and does not compete with it. We talked about the fact that the one in [REDACTED] of the future and the prototype for other centers. He said that it does not need to be a full building like the one in [REDACTED] but would have to be a few thousand square feet. He explained that they are always worried that if we had [REDACTED] that it would compete for our attention with the one in [REDACTED] - which is clearly where he has [REDACTED]. He said that he sees this as a place that will synergize with the [REDACTED]. I reassured him that we would never withdraw our attention from the [REDACTED] - he will want to put this in any future gift since he said that Chancellors, Provosts, and Deans come and go.

Bottom line is that he would like to make a gift to build [REDACTED] as part of our COM. I said that part of the funds would need to go to build out the facility and that part of it should go into an endowment for the operations of the center. I told him that it would be critical that his gift be to the UIUC COM, and not transferrable to UIC, just like the Carle \$100M is not transferrable. I pointed out that his gift to Peoris is attributed to UIC, but I did not want to go into too much detail on this. We just need to pay attention to this. I told him that it would be wonderful if we could get an agreement before the March BOT meeting to demonstrate that our goal of raising \$200M is not unreasonable. He said that was reasonable. I told him that I would let Molly know and that she could work with him on writing a proposal that could hopefully be signed before March.

I also met with [REDACTED] the co-founder of [REDACTED] healthcare start-up. He is an Illinois alum and has hired several Illinois alums. They invest in health-related researchers. Interestingly, part of their company is funded by BC-BS's umbrella HCHS. They know people in the health arena and he said that he would be happy to introduce me to them. I don't know where this might lead to, but it is worth following up. I told him that I would let him know the next time I am in Chicago.

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Phyllis

From: James.Leonard <James.Leonard@Carle.com>
Sent: Wednesday, December 17, 2014 1:27 PM
To: [REDACTED]
Subject: FW: Mayo expansion project with local and state tax support
Attachments: About Destination Medical Center.docx

Here is the "investment" announcement- nice cooperation. I will send you the tax document in next mailing.
Jim

From: Mike.Billimack
Sent: Wednesday, December 17, 2014 12:57 PM
To: James.Leonard
Subject: Mayo expansion project with local and state tax support

Summary of Mayo's Destination Medical Center project, which will receive up to \$455 million in local/state tax-generated support.

Web Site for DMC governance: <http://www.dmc corporation.org/>

About Destination Medical Center

The 20-year Destination Medical Center (DMC) public-private partnership is aimed at securing Minnesota's competitive position as an international hub for health care and medical advancement, and making the Rochester region an economic center for job growth and business development. The state's \$455 million investment in the project over the next two decades will leverage an estimated \$5.6 billion in local and private investment, and create tens of thousands of new jobs.

Over the last 150 years, Mayo Clinic has earned an international reputation for excellence in health care and medical advancement, treating more than half a million patients in its Rochester facilities every year. Today, Mayo Clinic is Minnesota's largest employer, providing good-paying jobs for more than 40,600 Minnesotans, including over 33,000 in Rochester, and generating a \$9.6 billion annual economic impact to the State of Minnesota – roughly 4 percent of the state's total GDP. And each year, Mayo Clinic contributes approximately \$1.5 billion in tax revenue to the State of Minnesota and local governments.

With the new DMC initiative, Mayo Clinic is poised to expand dramatically, making targeted investments in the Rochester community that will secure the region's position as one of the most elite medical destinations in the world. As a result of this initiative, Mayo Clinic will add another 25,000 to 30,000 Minnesota jobs over the next 20 years. Economic development generated by DMC will also result in the creation of thousands of more jobs in the region – including construction jobs.

State funding for DMC will be supplemented by an additional \$3.5 billion from Mayo Clinic, \$128 million from the City of Rochester and Olmsted County, and an estimated \$2 billion from private investors. The initiative will also generate an estimated \$3.2 billion in state tax revenue over the next 20 years. In total, the project will leverage an estimated 22 to 1 return on the state's investment.

State funding for the DMC initiative will be used to fund projects for public infrastructure, including the acquisition of property, demolition or repair of buildings, land remediation, and site improvement. State funds will also be used for the construction of buildings, parks, roads, transit facilities, parking facilities, and other cultural and recreational amenities that will enhance the region's quality of life and encourage additional growth by making Rochester an even more desirable place to live, work, and raise a family.

These infrastructure improvements are crucial to support and sustain economic growth in the region and Rochester's downtown center. To date, infrastructure repair and construction have not kept pace with the rapidly growing Mayo Clinic – putting a strain on the city's resources, and limiting the possibilities for future growth. Right now there is an eight-year waiting list for parking spots at Mayo Clinic; current projections show hospitality businesses in Rochester will need 1,100 more hotel rooms in the coming years just to serve the families, friends, and guests of Mayo Clinic patients.

Mayo Clinic celebrates state funding approval, but questions remain on expansion details

Business Elizabeth Baier · ROCHESTER, Minn. · May 23, 2013

Mayo Clinic's proposed 20-year, \$5 billion investment plan to make its flagship campus a "destination medical center" is closer to becoming reality.

The tax bill awaits Gov. Mark Dayton's signature to become law, but Mayo Clinic, local and state officials are celebrating the legislative victory, which commits \$327 million in state aid for Rochester, Minn.

Amid the celebration, questions remain about how exactly the clinic plans to expand and how local taxpayers will contribute to the growth in Rochester.

Hundreds of Mayo employees, local and state officials, even former Vice President Walter Mondale filled the lobby of the Mayo Clinic building in Rochester Wednesday, to celebrate what Mayo and government officials say is the largest economic development initiative in Minnesota's history.

Dayton described the passage of Mayo's expansion legislation as "almost unprecedented."

Destination Medical Center Alex Kolyer for MPR

"If this expansion and leap forward were not happening in Rochester, Minnesota, it'd happen somewhere else in the country," Dayton said. "We'd be the big losers and they'd be the big winners. We're very grateful that it's here in Minnesota."

He said the most promising aspect of Mayo Clinic's proposal is the number of jobs it is expected to create over the next two decades. Mayo Clinic officials estimate the expansion will add up to 15,000 highly-paid medical positions -- doctors, researchers and support staff -- and another 25,000 spinoff jobs in southeastern Minnesota.

Currently, Mayo Clinic employs roughly 32,000 people in Minnesota, and is the largest private employer in the state. About a third of Rochester's residents work at the clinic.

"People will work on this for 10, 20 years. I mean those are careers," Dayton said. "So to put all the people to work -- all the people will be working professionally, in the expanded facilities, and the transformation of downtown Rochester -- is just tremendously exciting."

What Rochester's transformation will look like is still unclear. State funds won't kick in until the Mayo Clinic invests least \$200 million in the city.

Mayo President and CEO Dr. John Noseworthy says the clinic already has teams in place mapping out the project's next steps but declined to give details about those plans on Wednesday.

Destination Medical Center Alex Kolyer for MPR

"We now have the opportunity to plan in a very specific way what happens," Noseworthy said. "It won't be random, first to the table, let's do something over here. It'll be all knitted together in an integrated way for the city, the county and the state."

In all, Mayo Clinic plans to invest \$3.5 billion in capital improvements. That could include adding new space to the clinic's existing facilities, upgrading patient rooms or building research or administrative buildings on existing parking lots. Mayo currently owns nearly 500 acres in Rochester to support its growth plans, as of Mayo Clinic's 2011 Five-Year Plan Update. Mayo Clinic also expects an estimated \$2 billion in additional private investment.

Once the governor signs the bill into law, Mayo will have 60 days to put together an eight-member nonprofit oversight board. The bill will also authorize the city of Rochester and Olmsted County to raise \$128 million in local taxes to help with the expansion.

City Council President Randy Staver said the legislation allows Rochester officials to raise those taxes by increasing the local sales tax, adding a food and beverage tax, and taxing certain entertainment events.

"What we're very happy to see is the Legislature gave us a number of tools in the legislation, and that's noteworthy because now we've got some flexibility," Staver said.

He said the city still has to determine how it will make its obligation for Mayo Clinic's expansion plan work.

"I think we'll want to choose tools that have the least amount of burden on taxpayers in general. We don't want the taxpayers of Rochester to bear the burden of all of this," Staver said. "We'll look do to things that are equitable, and across a number of citizens and structures."

Olmsted County Board Chair Jim Bier says the county's \$40 million share of the project will likely come from an increase in county taxes.

"I would anticipate we'll have the wheelage tax, I would think, and maybe the sales tax. I don't know," Bier said. "We've got to talk about that. We've got to have some meetings with the other commissioners. But I think we'll do one for sure and maybe both."

Bier anticipates the Olmsted County Board will make those decisions by the end of the year. Mayo Clinic officials say they will release more information on their expansion plans later this summer.

From: James.Leonard <James.Leonard@Carle.com>
Sent: Wednesday, December 17, 2014 3:47 PM
To: [REDACTED]
Subject: Actual Mayo Tax situation
Attachments: Scanned from a Xerox multifunction device001.pdf

Here is the other article as promised.

Have a great evening.

Jim

-----Original Message-----

From: u41f@carle.com [mailto:u41f@carle.com]
Sent: Wednesday, December 17, 2014 3:41 PM
To: James.Leonard
Subject: Scanned from a Xerox multifunction device

Please open the attached document. It was scanned and sent to you using a Xerox multifunction device.

Attachment File Type: pdf

multipurpose device Location: Administration NC8 - B1914
Device Name: U41F

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Mayo Clinic provided \$2.5 billion in 'community benefit'

Ken Klotzbach / kklotzbach@postbulletin.com

Mayo Clinic's Charlton and Gonda buildings in downtown Rochester.

Posted: Friday, January 17, 2014 4:26 pm | Updated: 9:11 pm, Fri Jan 17, 2014.

Mayo Clinic provided \$2.5 billion in 'community benefit' [Edie Grossfield](#), egrossfield@postbulletin.com

Mayo Clinic, by far Olmsted County's largest property owner and taxpayer, pays millions of dollars less in property taxes because of its tax-exempt status than if it were entirely a for-profit operation.

However, the clinic gives much more back to the community through charitable care and other contributions, according to Information provided by the Olmsted County Property Records and Licensing Department and Mayo Clinic. Charitable care frequently is used to justify hospital's nonprofit and tax-exempt status.

Need an account? Create one now.

The estimated market value of Mayo's many properties in Olmsted County is approximately \$820 million, including both nonprofit and for-profit operations. But Mayo pays property taxes on just over half of that amount.

Mayo's total 2014 property tax bill, including city, county and school district property taxes, of about \$16.6 million relates to approximately \$451 million in estimated market value, said Property Records and Licensing Director Mark Krupski.

Buildings housing education and research operations, of which Mayo has many, are not taxable. Each year, Krupski gets together with Mayo finance officials, who tell him what percentage of the clinic's property is taxable.

"We accept that. They've been a good taxpayer and they let us know what percentage of their building, say, is being used for education or research," he said.

In addition, Mayo pays property taxes on buildings it owns for its other businesses, such as Mayo Medical Transport's Gold Cross ambulance service, the Charter House senior housing complex and Mayo Employees Federal Credit Union.

Mayo does not pay taxes on another \$369 million worth of property it owns in Olmsted County. For that amount, the total 2014 tax bill would be about \$13.6 million. Mayo, like other tax-exempt entities, also saves money in other state and federal taxes.

Nonprofit hospitals around the nation have come under increased scrutiny in recent years regarding the billions of dollars they save in tax breaks versus how much they contribute to their local communities.

In some cases, it appears that nonprofit hospitals are providing few charitable benefits to the communities in which they save millions for their tax-exempt status. The New England Journal of Medicine learned that since 2009, hospitals spent an average of 7.5 percent of their operating costs on charity care and community benefit and that some spent less than 1 percent, according to a Jan. 18 New York Times article.

That article also highlighted the City of Pittsburgh's lawsuit against the University of Pittsburgh Medical Center. The city contends that the "\$10 billion global health enterprise" is taking advantage of its tax-exempt status by providing very little care for the poor and a comparably small amount of charity to communities.

While some people in Olmsted County might consider it a disadvantage to have the largest commercial property owner in town be exempt of about half of its property taxes, Krupski said he wouldn't agree with that.

"Because everything else wouldn't be here if it wasn't for them," he said.

Olmsted County and Rochester officials probably wouldn't deny that they could find good use for the nearly \$14 million in additional tax revenue, but the community benefits from many more millions in charitable care and other contributions Mayo makes here, said Mayo Public Affairs Specialist Bryan Anderson.

He didn't have a breakdown of what the clinic contributes to Rochester and Olmsted County specifically, but he said the entire Mayo enterprise, including its Arizona and Florida operations, provided \$2.5 billion in "community benefit" in 2012.

Of this amount, \$885 million was the direct cost of Mayo education and research programs, and \$2.5 million was the cost of in-kind donations, un-billed service, and cash donations," Anderson said.

"Mayo Clinic is dedicated to serving all patients who need our care. Approximately half of our medical services are for Medicare patients and patients in other government programs," he added.

In 2012, \$1.6 billion of Mayo's services went unpaid through Medicare, Medicaid and other senior and indigent care programs, and the clinic provided another \$83.4 million in charity care "to patients in significant financial need," Anderson said.

Mayo invested more than \$2.5 million in 2012 in local communities' health and wellness, education, youth enrichment, workforce development and human services programs, he said.

Rochester City Council President Randy Staver, who is a Mayo employee, said that as far as he knows, Mayo has always followed the rules with regard to its tax-exempt status.

"In terms of the amounts that they contribute to their respective communities, I've always felt that Mayo contributes significantly to the city of Rochester. I've never had any reason to question that. But again, as far as whatever that is, whether it meets an acceptable level for a community, that's an open topic for the community and the contributors to decide," Staver said.

From: Phyllis Wise [REDACTED]
Sent: Thursday, January 08, 2015 3:14 PM
To: Normand Paquin
Subject: Re: For discussion

Thanks for sending this. It's a good framework for our conversation.

Sent from my iPad

On Jan 8, 2015, at 3:05 PM, Normand Paquin <[REDACTED]> wrote:

Here are talking points:

Point-by-point

March 12 BOT resolution

- Not a resolution as such but a proposal to go through Academic Senate and USC.
- Most important: get strong Academic Senate support on Feb 9th
 - Key: getting strong support from key faculty senate committees
 - Willing to secure that even if it creates headaches later on
- USSP – will contact Bill Maher (copying you?) to request special USSP meeting
 - Will point out timing, especially with respect to Ed Pol
 - Will include proposal and point out footnote committing us to continued engagement with key committees
 - Will ask for preferred interaction: USSP member embedded in Definitive Agreements team or regular consultation (in addition to SEC involvement)
- Budget committee
 - Vicky has developed new budget analyses base don committee lead requests
 - I need to review and put together in a short document
 - Will make sure draft meets their expectations/needs
 - Will request a special meeting for strong endorsement
- Ed Pol
 - Gay Miller has encouraged Ade and I to meet with key Ed Pol starting with sub-committee leads
 - Has wavered back and forth a bit on whether this is a good idea or not (not usually done but not every day we try for a new College support under such tight time window)
 - Ade volunteered to meet with Ed Pol members but his schedule looks very difficult
 - Members of faculty panel willing to support me anyway they can
 - My inclination is that
 - We need to meet not just with those who challenged concept but others to make sure support is strong and ready to be vocal
 - We need to get as much buy-in from those who were vocal as possible
 - Might not get unanimous support but should be strong by the end of the effort
 - Mike Sandretto has offered to speak to Ed Pol but I think that is risky.
 - Perhaps allow it if Jeff Brown can come as well and Gay thinks it is a good idea
 - IHIS will provide a letter of support
- Deans

- Ade needs to secure letters of support from remaining deans as well as key departments
- February 9th Academic senate meeting
 - Consultation with Roy? Gay?
 - Urbana city council member?
 - Carle physician speaking rights?

President's charge

- Huron presumably working on response for the President
- Developing our answers that represent our perspective.
 - Asked Laura to creatively address “concerns of stakeholders.”
 - Asked Robin Kaler to gather info that address the rest of the President’s charge
 - Suggested time line
 - Middle of next week (Wed. January 14th) for their drafts
 - Circulate revised draft early following week
 - Submit to President Easter by Friday, January 23rd.

Definitive Agreements

Outcomes of Monday meeting with Scott Rice, Lisa Power, Dan Peterson and Mike Delorenzo

- Aim to first develop “term sheet” before tackling legal language
 - Consensus that Carle may attempt to be very prescriptive
 - Statement of basic principles we agree on may be better
- Approach: small core team of negotiators spanning all areas including legal representation
- Core team supported by subject matter experts for sub-topics: i.e. philanthropy, IP, finance, etc.
- Recruiting expert advisor to make sure agreement is appropriate and covers what it needs to cover and not more
 - Thinking that such an advisor might be recommended by LCME
- Suggestion that Phyllis, Jim, key advisors on each side define “four corners” of the definitive agreements in order to get these done “quickly.”
 - Three to six months
 - Leave aside but keep in mind possibility of working on modifying MOU for signature
 - So we don’t upset USSP Committee
 - So we can start recruiting dean (if that looks at all plausible) – not sure Carle Board would OK that

Outcomes of Tuesday meeting with broad set of UA and UIUC admin folks

- Risk management, HR, UA Business and Finance, Research,
- Generally speaking went well
 - Sticky points likely to be at HR level – conflict of management; retreat rights

Friday Carle – UIUC project leadership meeting

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED] <image.png>

From: [REDACTED] and Dan Peterso
Sent: Friday, January 09, 2015 8:21 PM
To: Beth Painter
Subject: Fwd: CR for [REDACTED]

Fyi re follow up visit or call with [REDACTED] Ask Leanne about entering the cr. thx.

Begin forwarded message:

From: Phyllis Wis [REDACTED]
Date: January 9, 2015 at 5:38:12 PM CST
To: Smith Travis <[REDACTED]> Tracy Molly <[REDACTED]>
Peterson Dan <[REDACTED]>
Subject: CR for [REDACTED]

All,

I don't have Karen Bender's personal email. Please pass this to her since she was supposed to staff me and had made all the arrangements for this visit. [REDACTED] and I had lunch in Rosemont on 1/9/15. We had a wonderful time and talked about a variety of topics. The following is a summary of the major points.

1. She said she was disappointed at the rapid departure of [REDACTED] (I can't remember his last name and it has been removed from my calendar - I might be able to get it from Adam or Phyllis). He had been the [REDACTED] for a short time and [REDACTED] had arranged for him to meet me. He was transferred to the [REDACTED] in SF and was promptly put on a plane on Monday. This is a promotion for him. She hopes that his replacement will be as strategic and that she will be able to introduce her to me when the time is appropriate.
2. She told me about her transition to management through a series of coincidences. We compared notes on our career progression. She explained the differences between hepatitis A, B and C and how treatments to one were not effective in combating another because the only thing they share in common is that they affect the liver. Fascinating discussion.
3. She asked about the status of the COM. We went into some detail on what we had accomplished and the next steps. I told her about the need to raise funds. She was very interested in all of this and asked whether we would be starting this next year...
4. She told me that she has been doing some financial planning and reminded me that her endowed chair in immunology and infectious diseases was in her estate. She said she would like to see the impact of the endowment before she dies. I told her there were ways to allow her to give the equivalent of the pay out on an annual basis and then have the corpus be activated when the estate was activated. I told her that Dan was a lawyer and knew a lot about estate planning. I told her that you, Dan, would contact her to explain her options. She seemed pleased and will be waiting for your contact. She said she would be pleased if the faculty who holds the chair had a joint appointment with the COM if possible.

Phyllis

Sent from my iPad

From: Phyllis Wise
Sent: Sunday, January 11, 2015 9:54 AM
To: Leanne Courson
Cc: Peterson Dan; Smith Travis; Tracy Molly
Subject: Re: Contact report for [REDACTED]

Thanks. I just texted her and asked for her private email so I could send this and the one on [REDACTED]

Sent from my iPad

> On Jan 11, 2015, at 9:21 AM, Leanne Courson <[REDACTED]> wrote:
>
> All, I just forwarded this to Karen. Leanne
>
> Sent from my iPhone
>
>> On Jan 11, 2015, at 9:17 AM, Phyllis Wise <[REDACTED]m> wrote:
>>
>> Please send this to Karen Bender. She was supposed to staff me for this meeting and helped with all the arrangements.
>>
>> I met with [REDACTED] at [REDACTED] headquarters. [REDACTED] were not there. It was a very good meeting.
Here is the summary?
>>
>> 1. [REDACTED] has a very large framed print of the "welcoming gate" to the campus, which is now at the corner of the Alumni Center building hung very prominently in his office. He said that he is a proud alum of Illinois, but a bad one - his words - because he does not give. I said we could fix that. He said that if we could make it easy to get the match from [REDACTED] that would make his life easy. He said the University of Chicago takes care of the match for him, but that other organizations make him do all the work. I said I was certain that we took care of that. He said he was not certain of the amount that [REDACTED] would match. But he did not give me the impression that he would only give as much as would be matched.
>>
>> 2. Said he wants Illinois to be the premier research organization. I described our grand challenge grant with Abbott Nutrition. He seemed interested in developing a similar relationship with [REDACTED]. He said their areas of expertise/strengths/interests were drug discovery - small and large molecule antibody development, particularly bi-focal where a drug can be attached to an antibody to target drug delivery, medicinal chemistry, immunology, oncology, virology, neuroscience, diseases of aging. This is very broad. I suggested that we gather a group of our researcher and visit with their appropriate people to explore areas of overlap. I think that the next best step for this is to contact Peter Schiffer and ask him to identify our people and arrange a meeting. Pradeep should be involved. We did this with [REDACTED] a couple of years ago, and although they were not ready for a grand challenge like proposal, it was a worthwhile meeting.
>>
>> 3. I told him about our new COM. He was excited and said that it was absolutely the right thing to do.
>>
>> 4. We discussed their new presence in the Research Park. He said that they recruit predominantly from Illinois and Indiana and that he was using the presence in the park to attract students. I told him we were excited about that.
>>
>> 5. He ended by re-iterating how important Illinois was for his career, and that he would be willing to be a resource for the COB or the COM.

>>
>>
>> Phyllis
>>
>> Sent from my iPad

From: Phyllis Wise [REDACTED]
Sent: Sunday, January 11, 2015 7:45 PM
To: [REDACTED]
Subject: Fw: CR for [REDACTED]

Karen,

Here's the contact report on my meeting with [REDACTED]

Phyllis

----- Forwarded Message -----

From: Phyllis Wise [REDACTED] >
To: Smith Travis [REDACTED]; Tracy Molly [REDACTED]; Peterson Dan [REDACTED] >
Sent: Friday, January 9, 2015 5:38 PM
Subject: CR for [REDACTED]

All,

I don't have Karen Bender's personal email. Please pass this to her since she was supposed to staff me and had made all the arrangements for this visit. [REDACTED] and I had lunch in Rosemont on 1/9/15. We had a wonderful time and talked about a variety of topics. The following is a summary of the major points.

1. She said she was disappointed at the rapid departure of [REDACTED] (I can't remember his last name and it has been removed from my calendar - I might be able to get it from Adam or Phyllis). He had been the [REDACTED] for a short time and [REDACTED] had arranged for him to meet me. He was transferred to the [REDACTED] in SF and was promptly put on a plane on Monday. This is a promotion for him. She hopes that his replacement will be as strategic and that she will be able to introduce her to me when the time is appropriate.
2. She told me about her transition to management through a series of coincidences. We compared notes on our career progression. She explained the differences between hepatitis A, B and C and how treatments to one were not effective in combating another because the only thing they share in common is that they affect the liver. Fascinating discussion.
3. She asked about the status of the COM. We went into some detail on what we had accomplished and the next steps. I told her about the need to raise funds. She was very interested in all of this and asked whether we would be starting this next year...
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Phyllis

Sent from my iPad

From: Phyllis Wise
Sent: Sunday, January 11, 2015 7:49 PM
To: [REDACTED]
Subject: Fw: Contact report for [REDACTED]

Karen,

Here's the contact report for [REDACTED]

phyllis

----- Forwarded Message -----

From: Phyllis Wise > [REDACTED]
To: Peterson Dan [REDACTED]; Smith Travis <[REDACTED]>; Tracy Molly [REDACTED]

Sent: Sunday, January 11, 2015 9:17 AM

Subject: Contact report for [REDACTED]

Please send this to Karen Bender. She was supposed to staff me for this meeting and helped with all the arrangements.

I met with [REDACTED] at [REDACTED] headquarters. [REDACTED] were not there. It was a very good meeting. Here is the summary?

1. [REDACTED] has a very large framed print of the "welcoming gate" to the campus, which is now at the corner of the Alumni Center building hung very prominently in his office. He said that he is a proud alum of Illinois, but a bad one - his words - because he does not give. I said we could fix that. He said that if we could make it easy to get the match from [REDACTED] that would make his life easy. He said the University of Chicago takes care of the match for him, but that other organizations make him do all the work. I said I was certain that we took care of that. He said he was not certain of the amount that [REDACTED] would match. But he did not give me the impression that he would only give as much as [REDACTED] would be matched.

2. Said he wants Illinois to be the premier research organization. I described our grand challenge grant with Abbott Nutrition. He seemed interested in developing a similar relationship with [REDACTED]. He said their areas of expertise/strengths/interests were drug discovery - small and large molecule antibody development, particularly bi-focal where a drug can be attached to an antibody to target drug delivery, medicinal chemistry, immunology, oncology, virology, neuroscience, diseases of aging. This is very broad. I suggested that we gather a group of our researcher and visit with their appropriate people to explore areas of overlap. I think that the next best step for this is to contact Peter Schiffer and ask him to identify our people and arrange a meeting. Pradeep should be involved. We did this with [REDACTED] a couple of years ago, and although they were not ready for a grand challenge like proposal, it was a worthwhile meeting.

3. I told him about our new COM. He was excited and said that it was absolutely the right thing to do.

4. We discussed their new presence in the Research Park. He said that they recruit predominantly from Illinois and Indiana and that he was using the presence in the park to attract students. I told him we were excited about that.

5. He ended by re-iterating how important Illinois was for his career, and that he would be willing to be a resource for the COB or the COM.

Phyllis

Sent from my iPad

From: Normand Paquin [REDACTED]
Sent: Tuesday, January 13, 2015 6:00 PM
To: Phyllis M Wise
Subject: Re: Names

Hi Phyllis,

That is correct but what emerged was that comparison was not worth that much since UIC COM/UIH combination was not a very good. That's why I have pushed for U of C comparison where Carle does quite well.

Just spoke to Mike Devocelle (I know him from his Beckman days). I asked him if he was the lead on putting this together and he answered he was staffing the effort for the President but that there were a few individuals contributing. He indicated he would welcome any inputs I might have.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Mon, Jan 12, 2015 at 8:05 PM, Phyllis M Wise <[REDACTED]m> wrote:
And I thought Thanatos they do more clinical trials than UIC - or that's what Jennifer E said at one time.

Sent from my iPhone

On Jan 12, 2015, at 7:51 PM, Normand Paquin <[REDACTED]> wrote:

There are about 15 voting members. We should be more than fine based on Gay's assessment but I want to do all I can to be sure. She counts McCarthy in the yes camp despite his questions. I plan to meet with him. Carle compares not only favorably to UIC but also U of C in terms of patient flow.

Normand

On Jan 12, 2015 6:39 PM, "Phyllis Wise" <[REDACTED]m> wrote:
Thanks for this info. How many people total are there on this committee? Are the majority supportive even if these do not support it or do we have to get some of them. McCarthy does not seem to understand their existing strengths and their commitment to this project, including the \$100m commitment.

Sent from my iPad

On Jan 12, 2015, at 10:41 AM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

You asked me to let you know who had been vocal in Ed Pol. Here are the four names.

Pradeep Dhillon - asked if humanities was considered; has connection with Neal Cohen - likely will actually be positive in the end.

Randy McCarthy (Mathematics) - has questioned Carle as a suitable partner and suggested that delaying three-five years might be better (so that Carle can be evaluated). Hopefully can turn around. Not sure we will be able to.

Steve Michel (Business) - very aggressive. Gay thinks he will actually be supportive if we argue our case well. I am not so sure. Always seems ready to pull out another argument if the first is handled well.

Eric Meyer (Media) - sounded like a mouthpiece for Dimitri last time.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

From: Barnhart, Leanne Rodgers <leanne1@illinois.edu>
Sent: Wednesday, January 14, 2015 5:48 AM
To: Phyllis Wise
Subject: Re: 2/20 College of Medicine Briefing

Ok, we will work on that approach. I will also ask Phyllis for some dates for Chicago.

Thanks,
Leanne

Sent from my iPhone

On Jan 13, 2015, at 9:05 PM, "Phyllis Wise" [REDACTED] wrote:

Leanne,

If you use Feb 20, it would be great to do something in Champaign and not Chicago. That way I might be able to stop in at the Berenbaum reception from 5-5:30 and we could still do something for the COM.

Phyllis

Sent from my iPad

On Jan 13, 2015, at 5:58 PM, "Barnhart, Leanne Rodgers" <leanne1@illinois.edu> wrote:

Chancellor Wise,

Please let me know which you prefer – to use this date for the reception to honor May Berenbaum for the National Medal of Science or for a COM Briefing event? I learned today that this is one of ONLY FOUR dates which Jim Leonard can attend.

I have been in meetings all afternoon and have plans to offer it to any of the following: [REDACTED]
[REDACTED]

Please let me know. Thanks,
Leanne

From: Bear, Adam J
Sent: Tuesday, January 13, 2015 4:36 PM
To: Wallace, Kari J
Cc: Barnhart, Leanne Rodgers
Subject: RE: 2/20 College of Medicine Briefing

May we release this date to give to Provost's office for this reception?

Adam Bear
Office of the Chancellor
University of Illinois at Urbana-Champaign

601 East John Street
317 Swanlund Administration Building MC-304
(217)244-9157
<http://www.oc.illinois.edu>

From: Wallace, Kari J
Sent: Tuesday, January 13, 2015 4:36 PM
To: Bear, Adam J
Cc: Barnhart, Leanne Rodgers
Subject: RE: 2/20 College of Medicine Briefing

Adam,

We don't have any plans confirmed for that date (as far as I know). We have it held, tentatively, for Chicago.

Thanks,
Kari

*Kari J. Wallace | (217) 333-4087 | kiwallac@illinois.edu
Under the Illinois Freedom of Information Act, any written communication to or from university employees regarding university business is a public record and may be subject to public disclosure.*

From: Bear, Adam J
Sent: Tuesday, January 13, 2015 2:23 PM
To: Wallace, Kari J
Subject: FW: 2/20 College of Medicine Briefing

Sorry, meant to copy you on this. This was what I called about.

Adam Bear
Office of the Chancellor
University of Illinois at Urbana-Champaign
601 East John Street
317 Swanlund Administration Building MC-304
(217)244-9157
<http://www.oc.illinois.edu>

From: Bear, Adam J
Sent: Tuesday, January 13, 2015 2:17 PM
To: Barnhart, Leanne Rodgers
Subject: 2/20 College of Medicine Briefing

Leanne,

Are there any concrete plans to use the Friday, Feb. 20 College of Medicine briefing date? This date has been chosen for a reception to honor Prof. Berenbaum for her National Medal of Science and is the date that she was available. The Provost's office would like to go ahead with those plans, but I wanted to check with you to see if we could make the Chancellor available, since we'd offered that date. The reception would likely be 5-6:30.

Thank you,

Adam Bear
Office of the Chancellor
University of Illinois at Urbana-Champaign
601 East John Street
317 Swanlund Administration Building MC-304
(217)244-9157
<http://www.oc.illinois.edu>

From: Phyllis M Wise [REDACTED]
Sent: Thursday, January 15, 2015 9:08 PM
To: Rick Stephens
Cc: Peter B. Fox; Jim Leonard; Greg Lykins; Habeeb Habeeb; [REDACTED] Laura Frerichs
Subject: Re: Reminder: Dinner with Dr. Killeen

Dear Rick,

Thanks again for hosting the dinner next Thursday at your lovely home. 6:00pm will be fine. I am sure that President Killeen will have a wonderful evening.

Best,
Phyllis

Sent from my iPhone

> On Jan 15, 2015, at 6:42 PM, Rick Stephens <rick@investres.net> wrote:
>
>
>> Good evening everyone, (although it's early afternoon in HI)
>
>> We are still planning to have dinner at our home on the 22nd, next Thursday. General details at this point are:
>>
>> Dinner at the Stephens January 22, 2015 [REDACTED]
>> Champaign
>>
>> Tentatively 6 PM although Phyllis' schedule for him will dictate
>> the time in the end
>>
>> Attending will be: Dr. Timothy Killeen (his wife Dr. Roberta Johnson will be arriving too late that evening to make it)
>> Dr. Phyllis Wise and Dr. Richard Meisenger
>> Dr. Jim Leonard [REDACTED] will be out of town)
>> Peter Fox [REDACTED] may or may not be in town)
>> Greg and [REDACTED] Lykins
>> Habeeb and [REDACTED] Habeeb Laura Frerichs
>> [REDACTED] and Rick
>
>> We are planning it to be a business casual, relaxing time for us to get to know each other and give Dr. Killeen some background on the community. We are planning to open with a cocktail hour and sit down for dinner about 7.
>
>> I am open to your suggestions but am thinking that if we don't plan any presentation the conversation will naturally move toward the importance of the new COM to the community at dinner. If it hasn't come up on its own, I will open the topic at dinner so we can discuss as a group. Feel free to call me or email your ideas. We could certainly organize it more.
>>
>> Thanks for joining us! I think it will be great fun.
>>
>> Rick

>>

>>

>>

From: Phyllis Wise [REDACTED]
Sent: Friday, January 16, 2015 8:37 PM
To: Travis Smith [REDACTED]
Subject: Re: Contact report for [REDACTED]

Thanks, Travis. As always it was great working with you.

Best,
Phyllis

From: Travis Smith [REDACTED]
To: Phyllis Wise [REDACTED]
Sent: Friday, January 16, 2015 4:26 PM
Subject: Re: Contact report for [REDACTED]

Dear Chancellor Wise, please see below for my contact report with [REDACTED] I realized i didn't copy you on this originally because i wanted to use your personal email but then forgot to send, my apologies! She has told colleagues what a great visit she had and is excited to be helpful anyway she can. thank you again for this visit, especially considering how sick you were.

Travis

[REDACTED] visit, cultivation, 1/9/2014, joint with Chancellor Phyllis Wise

Travis Smith and Phyllis Wise met with [REDACTED] in [REDACTED] or dinner. Purpose of the dinner was to introduce the College of Medicine concept to her and gain her support/feedback for these plans. [REDACTED] was very appreciative to meet the Chancellor and immediately expressed her support for the COM vision. She took time to describe her background and career, explaining that she very much enjoyed her time at Illinois and felt very prepared for medical school. She shared that she was accepted to Georgetown but was talked out of it during her interview there as she was told that Georgetown was very expensive and that she would be wise to go elsewhere. Her career has been devoted to exploring and advocating for non-invasive procedures in the area of women's health. She has three clinics and is about to open a fourth (a 25,000 square foot facility). She very much believes in how space matters in health care and is taking great pains to create a warm, inviting space for her next clinic.

The topic turned to the COM and [REDACTED] gain stated her support and applauded the vision. She was quick to point out that how needed this approach was and how it would not, in her opinion, conflict with anything being done with UIC. Chancellor Wise took time to share her thoughts and motivations for starting a medical school on the Urbana campus, explaining that it fills a giant need for the university and the state of Illinois. [REDACTED]

[REDACTED] shared that she is still in touch with a core group of women from her college days and looks forward to being an advocate within her sphere of influence. She also made the offer to host an event with not only her close friends but also other influential physicians that she is in contact with for them to learn more about the plans. She offered the Chancellor a letter of support if needed; PW very much appreciative.

On a personal level, [REDACTED] shared that [REDACTED] and that [REDACTED] She believes at least one will want to attend Illinois. She talked quite a bit about physical health and her commitment to [REDACTED]. At the conclusion of the dinner, she told TS privately that she is pleased to be involved in any way she can and that she would be

looking to further her support of the COM as opportunities arise. She also told TS that she is very interested in the ILC but is having difficulty finding enough time right now with managing the construction of the new clinic. She felt her time open up dramatically after September. TS and PW thanked her for her support and promised to keep her engaged going forward.

To do:

1. Great COM gift candidate, most likely six figure, not seven due to where she is with family and career.
2. Need to further engage by allowing her to host a dinner/event.
3. More discussion on ILC and/or other ways to involve her more beyond giving. Need to get her to campus (BB game and campus visit being planned by Sean Williams and Trenton Blythe)

On Sun, Jan 11, 2015 at 9:17 AM, Phyllis Wise <[REDACTED]> wrote:
Please send this to Karen Bender. She was supposed to staff me for this meeting and helped with all the arrangements.

I met with [REDACTED] at [REDACTED] headquarters. [REDACTED] were not there. It was a very good meeting. Here is the summary?

1. [REDACTED] has a very large framed print of the "welcoming gate" to the campus, which is now at the corner of the Alumni Center building hung very prominently in his office. He said that he is a proud alum of Illinois, but a bad one - his words - because he does not give. I said we could fix that. He said that if we could make it easy to get the match from [REDACTED] that would make his life easy. He said the University of Chicago takes care of the match for him, but that other organizations make him do all the work. I said I was certain that we took care of that. He said he was not certain of the amount that [REDACTED] would match. But he did not give me the impression that he would only give as much as would be matched.
2. Said he wants Illinois to be the premier research organization. I described our grand challenge grant with Abbott Nutrition. He seemed interested in developing a similar relationship with [REDACTED]. He said their areas of expertise/strengths/interests were drug discovery - small and large molecule antibody development, particularly bi-focal where a drug can be attached to an antibody to target drug delivery, medicinal chemistry, immunology, oncology, virology, neuroscience, diseases of aging. This is very broad. I suggested that we gather a group of our researcher and visit with their appropriate people to explore areas of overlap. I think that the next best step for this is to contact Peter Schiffer and ask him to identify our people and arrange a meeting. Pradeep should be involved. We did this with [REDACTED] a couple of years ago, and although they were not ready for a grand challenge like proposal, it was a worthwhile meeting.
3. I told him about our new COM. He was excited and said that it was absolutely the right thing to do.
4. We discussed their new presence in the Research Park. He said that they recruit predominantly from Illinois and Indiana and that he was using the presence in the park to attract students. I told him we were excited about that.
5. He ended by re-iterating how important Illinois was for his career, and that he would be willing to be a resource for the COB or the COM.

Phyllis

Sent from my iPad

From: Molly Tracy <m...>
Sent: Monday, January 19, 2015 9:47 PM
To: Andreas Cangellaris <...>
Subject: Fw: [REDACTED]

Sent from my iPhone

Begin forwarded message:

From: Phyllis Wise <[REDACTED]>
Date: December 17, 2014 at 6:00:29 AM CST
To: Ilesanmi Adesida <[REDACTED].m>
Cc: [REDACTED] and Dan Peterso <[REDACTED].LRC
[REDACTED] Molly Tracy <[REDACTED]>
Subject: Re: [REDACTED]
Reply-To: Phyllis Wise <[REDACTED].m>

Ade,

And BTW [REDACTED] was not overly concerned with Sarah or [REDACTED] though he clearly is aware that they need to be cared for. I talked about continuing the M1 and that she really wanted that. I think the entire amount in your next email is right about where I was hoping for (actually \$50M) but we did not talk about the amount of the gift. It would be wonderful to have part of it for the COM operations or faculty or students. His company is clearly doing well.

Phyllis

From: Ilesanmi Adesida <[REDACTED]>
To: Phyllis Wise <[REDACTED]>
Cc: [REDACTED] and Dan Peterso <[REDACTED].LRC
[REDACTED] Molly Tracy <[REDACTED]>
Sent: Wednesday, December 17, 2014 1:14 AM
Subject: Re: [REDACTED]

Dear Phyllis,

Thanks for the comprehensive report. I am glad that [REDACTED] is coming around. I believe that the continued success of the [REDACTED] in Peoria is crucial to engaging [REDACTED] fully in Champaign and to support the NewCOM. I discussed with [REDACTED] a while back about the possibility of a [REDACTED] in Champaign, albeit smaller than the one in Peoria, he did not flinch at all. At that time, we had not hired Kesh, the Engineering lead of the collaborations with Peoria but now that he is on board and movement in the projects are visible, I believe that [REDACTED] will be supportive. He is an adjunct faculty in BioE here. We may get Kesh, Rashid, and Andreas to start thinking of areas that are complementary to what is going on in Peoria. No matter what we do though, bc [REDACTED] and Sarah Rusch will fell threatened by an [REDACTED] here. We have to keep reassuring them that we are in the game for the long-term even when this Chancellor, Provost, and Dean are long gone!

[REDACTED] company is international already, he has offices in [REDACTED] and I think he wants to expand to South America. I visited his office in [REDACTED] last year even before he went there! I hope he showed you the Green Room in his Chicago Office. This is the recovery (sleeping) room for his workers with migraines! I suppose you get this after spending days glued to a screen. He does have excellent workers, eager kids from the top schools.

I spoke with [REDACTED] couple of days ago in my office. We talked about his son's new company in Chicago. He was excited about the NewCOM and he said that it is something that they would like to contribute to. We need to work with him somehow. His son sold his previous company in [REDACTED] for over a [REDACTED]. So there is something there. His son is a [REDACTED] grad from here. Need some exploration.

Thanks.

Ade

On Tue, Dec 16, 2014 at 9:43 PM, Phyllis Wise <[\[REDACTED\]](#)> wrote:
Dear Dan, Leanne, and Molly and Ade,

This report is long.

The best part of my day was that I met with [REDACTED] at his place. He showed me around and told me about his business (i.e. he does best when there is volatility - he must have had a good day today). I am amazed that he started this in [REDACTED] - less than 20 years ago. He is global. He pointed out that the facility at the Research Park is the first time that he is setting up a facility as a site to basically interview students who could become his employees as well as a site where they actually do trading.

I told all about the COM, gave him the TU report, the support letters with the cover summaries, and the FAQs. I had a chance to go over in detail why it is unique, why Andreas and we believe that we have to do this for the future of the COE, the campus, Chicago, the state, why is complements UIC in every way, how UIC COM at Peoria will be fine with this, why Carle was the best partner, but that we would be partnering with OSF, the VA, etc (he clearly had heard from [REDACTED] that Carle was not an appropriate partner). He asked about UIC COM at Peoria - and I reassured him that we plan to continue to teach the M1 year - so no impact on UIC COM Peoria. Interestingly he was reading the UIC counter proposal on his monitor when I got there. And he had an amazing organizational chart on his white board that he had drawn for his person who will head up the [REDACTED] in the Research Park. It was amazingly accurate. It had UIUC, UIC, Peoria, UA (including Tim Killeen's name) - I was really impressed. So I could use his white board to explain what we were doing with our COM and why it was unique, how Carle had committed \$100M (he was impressed). I told him that I was starting to raise \$200M for the COM and that we were putting in proposals to foundations and were beginning to approach individual donors.

After all this, he said that he has to talk more with [REDACTED] but that he wants to start a [REDACTED] as part of our COM. He said that he needs to make sure that it complements what is in [REDACTED] and does not compete with it. We talked about the fact that the one in [REDACTED]

[REDACTED] He said that it does not need to be a full building like the one in [REDACTED] but would have to be a few thousand square feet. He explained that they are always worried that if we had [REDACTED] that it would compete for our attention with the one in [REDACTED] which is clearly where he has [REDACTED]. He said that he sees this as a place that will synergize with the [REDACTED]. I reassured him that we would never withdraw our attention from the [REDACTED] - he will want to put this in any future gift since he said that Chancellors, Provosts, and Deans come and go.

Bottom line is that he would like to make a gift to build [REDACTED] as part of our COM. I said that part of the funds would need to go to build out the facility and that part of it should go into an endowment for the operations of the center. I told him that it would be critical that his gift be to the UIUC COM, and not transferrable to UIC, just like the Carle \$100M is not transferrable. I pointed out that his gift to Peoris is attributed to UIC, but I did not want to go into too much detail on this. We just need to pay attention to this. I told him that it would be wonderful if we could get an agreement before the March BOT meeting to demonstrate that our goal of raising \$200M is not unreasonable. He

said that was reasonable. I told him that I would let Molly know and that she could work with him on writing a proposal that could hopefully be signed before March.

I also met with [REDACTED] he co-founder of [REDACTED] a healthcare start-up. He is an Illinois alum and has hired several Illinois alums. They invest in health-related researchers. Interestingly, part of their company is funded by BC-BS's umbrella HCHS. They know people in the health arena and he said that he would be happy to introduce me to them. I don't know where this might lead to, but it is worth following up. I told him that I would let him know the next time I am in Chicago.

I also met with [REDACTED] He is still [REDACTED] person. When I probed why, it is basically because he is not warm and fuzzy. I am convinced that [REDACTED] [REDACTED] He said that he had gotten a list of people from Travis, but did not really understand the context. He said he would call him and find out. He asked whether we had thought about the advisory group that Dan and I had talked about. I told him that I was counting on Dan to come up with a list of Chicago people/influencers who would make up a good advisory group. We talked about a campaign and what it would really need: multiple \$100-200M donors - he said that we don't have those kinds of people in Chicago, Two important things: (1) He re-iterated that he would get a luncheon with [REDACTED] said that he would check with [REDACTED] see whether he thought that we should do them together. (2) He said that he would be happy to organize a TL luncheon (12-15 people). He said that he thought a lunch would be better than a dinner because people are already in town. He said that people don't like to give up their evenings. Please share this part of the report with Travis.

Phyllis

From: Normand Paquin [REDACTED]
Sent: Tuesday, January 20, 2015 9:33 PM
To: Phyllis Wise
Cc: Adesida, Ilesanmi
Attachments: Response to the College of Medicine, January 22, 2015.docx; Response to the College of Medicine, November 10, 2014.docx

Phyllis,

I had shared concerns with Ade about what might come out of the budget committee based on a series of exchanges I had today with Mike Sandretto. The actual draft text Mike has sent me to review is much better than I had feared. Having said that, I'm going to suggest putting the positive conclusions up front and removing reference to the previous letter they had sent to Roy. Given that, I would welcome your thoughts on whether I should suggest some more significant changes. Keep in mind that Mike can get defensive and pressing too much might lead to a backlash. I attach the two responses.

I have to get back to Mike early in the morning, I'll say that Vicky did not have any major concerns.

On a different note, I would qualify our discussions Ade and I had with the three Ed Pol sub-committee chairs and Randy McCarthy went well. Eric Meyer, with expected caveats on not having a crystal ball, thought that the proposal was likely to "sail" through the committee based on the nature of the internal discussions that have been happening on that committee.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

January 24, 2015

To: Roy Campbell, Chair
Senate Executive Committee

From: Michael J. Sandretto, Chair
Senate Committee on the Budget

Re: Business Plan to Establish a New College of Medicine in Urbana-Champaign

Dear Professor Campbell:

You originally asked the Budget Committee be report to me you on the following:

1. Is the attached Business Plan thorough in identifying projected expense items and potential sources of revenue for the proposed new College of Medicine?
2. Is the financial plan consistent with commitments made to (i) not request any new General Revenue Funds be directed to the operation of the new College of Medicine, and (ii) not require the diversion of resources from other colleges?
3. Understanding that a final budget will be developed by the founding dean of the college and the initial college faculty and understanding that this budget will be subject to appropriate reviews at that time, does the financial plan provide for reasonable and sufficient revenues and investments to address the expenses that can be anticipated for the College?

In November 2014, we thoroughly reviewed the Business plan for the proposed College of Medicine and a more detailed set of financial projections. On November 10, 2014, we reported a number of concerns in an earlier response to your charge to the Budget Committee. Normand Paquin responded to many of our concerns in a Risk Scenario Analysis. The following is our current analysis of the original Business Plan, as amended by Normand Paquin's Risk Scenario Analysis.

1. The original Business Plan allocated no tuition revenue to either Urbana Campus administration or University Administration (UA). The Risk Scenario Analysis does allocate what we believe are appropriate percentages of revenue to those units.
2. The original proposal retained all fees for the College of Medicine, including student activity fees and health insurance fees. The Risk Scenario Analysis indirectly adjusts for this omission.
3. Tuition for both resident and non-resident students seems high compared with tuition rates at our expected peers. There is a five percent (5%) expense cushion in the Risk Scenario Analysis that should be adequate to partially address this concern.
4. The original proposal did not consider the possibility that the State of Illinois might transfer some benefit costs to the University. The Risk Scenario Analysis does adequately address this concern.

5. Fundraising may fall short of the Business Plan. However, Carle has agreed to expend considerable resources on fundraising on the proposed College of Medicine, since it will be a joint College of Medicine with the University of Illinois and Carle.
6. Facility costs are minimal because the Business Plan proposes to use existing resources. This is a concern but it may be addressed through fundraising and we do not consider it to be a significant concern.
7. Carle has agreed in a memorandum of understanding to cover half of all operating losses, which significantly reduces the risk to the University of Illinois and the Urbana Campus. However, when we mentioned the above concerns to Carle representatives, they were concerned that the Business Plan might be overly optimistic. It is essential that any memorandum of understanding that commits Carle to covering half of any operating losses clearly state how revenues and expenses will be allocated between the proposed College of Medicine, Urbana Campus administration, and University Administration (UA).

The Business plan also projected high but speculative benefits to the community. Those benefits seem unrealistically high. However, we do believe a College of Medicine at the Urbana Campus, in conjunction with Carle, would develop into a world-class medical school. That would provide significant economic and social benefit to the community. It also would add prestige to the Urbana Campus. More importantly, we believe a College of Medicine would provide significant new funding opportunities to many current Urbana Campus departments and faculty members.

The Senate Budget Committee believes:

1. The Business Plan, as modified by the Risk Scenario Analysis, is thorough in analyzing projected sources of revenue and expense for the proposed College of Medicine.
2. The Business plan, as modified by the Risk Scenario Analysis, is consistent with commitments made to (i) not request any new General Revenue Funds be directed to the operation of the new College of Medicine, and (ii) not require the diversion of resources from other colleges. Because the Business Plan makes projections for ten years, there can be no assurance that the College of Medicine will never require a diversion of resources from other colleges or will never request any new General Revenue Funds. However, we believe the risks are small and any shortfalls at the College of Medicine will not be large. In addition, the allocation of tuition revenue from the College of Medicine to Urbana Campus administration and University Administration (UA) will help cover some fixed costs, which will provide a benefit to other colleges at the Urbana Campus.
3. The Business Plan and the finance plan, as modified by the Risk Scenario Analysis, does provide for reasonable and sufficient revenues and investments to address the expenses that can be anticipated for the College?

In summary, the Senate Budget Committee believes the establishment of a new College of Medicine is an excellent opportunity and we endorse the Business Plan, as modified by the Risk Scenario Analysis.

Senate Committee on the Budget

Michael J. Sandretto, Chair

Yousif Ali

Deming Chen

Sally Jackson

Angela Lyons

Nolan Miller

Shuxin Zhang

Vickie Gress, ex officio

From: Normand Paquin [REDACTED]
Sent: Wednesday, January 21, 2015 5:50 AM
To: Phyllis Wise
Cc: Adesida, Ilesanmi
Subject: Re:

Phyllis,

Thank you for the guidance.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Tue, Jan 20, 2015 at 10:37 PM, Phyllis Wise [REDACTED] > wrote:
Normand,

With your suggestions of putting the positive conclusions first, I think this is fine. Given his personality, I don't think it is wise to suggest much more.

You've made incredible progress.
Phyllis

From: Normand Paquin <[REDACTED]>
To: Phyllis Wise <[REDACTED]>
Cc: "Adesida, Ilesanmi" [REDACTED]
Sent: Tuesday, January 20, 2015 9:32 PM
Subject:

Phyllis,

I had shared concerns with Ade about what might come out of the budget committee based on a series of exchanges I had today with Mike Sandretto. The actual draft text Mike has sent me to review is much better than I had feared. Having said that, I'm going to suggest putting the positive conclusions up front and removing reference to the previous letter they had sent to Roy. Given that, I would welcome your thoughts on whether I should suggest some more significant changes. Keep in mind that Mike can get defensive and pressing too much might lead to a backlash. I attach the two responses.

I have to get back to Mike early in the morning, I'll say that Vicky did not have any major concerns.

On a different note, I would qualify our discussions Ade and I had with the three Ed Pol sub-committee chairs and Randy McCarthy went well. Eric Meyer, with expected caveats on not having a crystal ball, thought that the proposal was likely to "sail" through the committee based on the nature of the internal discussions that have been happening on that committee.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

From: Phyllis Wise [REDACTED]
Sent: Friday, January 23, 2015 7:24 AM
To: Normand Paquin
Cc: Ilesanmi Adesida
Subject: Re:

Thanks, Normand. Great work!!!

From: Normand Paquin <[REDACTED]>
To: Phyllis M Wise <[REDACTED]>
Cc: Ilesanmi Adesida <[REDACTED]>
Sent: Friday, January 23, 2015 5:34 AM
Subject: Re:

Phyllis, Ade,

This is the final draft Mike shared with me before their meeting. I believe this is the version that was approved.

I would kindly request that you do not circulate this document until I know Roy has received it through proper channels.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Thu, Jan 22, 2015 at 9:27 PM, Phyllis M Wise <[REDACTED]> wrote:
Outstanding

Sent from my iPhone

On Jan 22, 2015, at 9:11 PM, Normand Paquin <[REDACTED]> wrote:

Phyllis, Ade,

Vicky has informed me that Budget Committee approved the support for the college of medicine. It is a much, much better letter than what you have seen so far. The letter is addressed to Roy Campbell. I am working to see where it is at so it can go to Ed Pol.

Normand

On Jan 21, 2015 10:47 PM, "Phyllis M Wise" <[REDACTED]> wrote:
Ditto.

Sent from my iPhone

On Jan 21, 2015, at 10:46 PM, Ilesanmi Adesida <[\[REDACTED\]](#)> wrote:

Thanks, Normand. Great progress.
Ade

On Wed, Jan 21, 2015 at 11:05 AM, Phyllis M Wise
<[\[REDACTED\]](#)> wrote:

Outstanding!

Sent from my iPhone

On Jan 21, 2015, at 10:32 AM, Normand Paquin
<[\[REDACTED\]](#)> wrote:

Phyllis, Ade,

Based on latest drafts, I think we are in good shape with
what the Budget Committee will consider.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [\[REDACTED\]](#)

On Wed, Jan 21, 2015 at 9:06 AM, Normand Paquin

<[\[REDACTED\]](#)> wrote:

Mike did have a modified version with additional points I felt
needed to be adjusted. I went ahead and made appropriate
suggestions. Jeff Brown is also being very supportive and
helpful. I would not talk to Mike until we get a sense of how
receptive he has been to the suggestions. I hopefully will
have a good read on that later today.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [\[REDACTED\]](#)

On Wed, Jan 21, 2015 at 8:58 AM, Ilesanmi Adesida

<[\[REDACTED\]](#)> wrote:

Agreed. If possible, I may find a way to talk to Mike. He is
very mercurial. He even thinks that all our budget models on
campus are clearly wrong and that he has the solutions!

On Tue, Jan 20, 2015 at 10:37 PM, Phyllis Wise

wrote:

Normand,

With your suggestions of putting the positive conclusions first, I think this is fine. Given his personality, I don't think it is wise to suggest much more.

You've made incredible progress.

Phyllis

From: Normand Paquin <[REDACTED]>
To: Phyllis Wise [REDACTED]
Cc: "Adesida, Ilesann [REDACTED]"
Sent: Tuesday, January 20, 2015 9:32 PM
Subject:

Phyllis,

I had shared concerns with Ade about what might come out of the budget committee based on a series of exchanges I had today with Mike Sandretto. The actual draft text Mike has sent me to review is much better than I had feared. Having said that, I'm going to suggest putting the positive conclusions up front and removing reference to the previous letter they had sent to Roy. Given that, I would welcome your thoughts on whether I should suggest some more significant changes. Keep in mind that Mike can get defensive and pressing too much might lead to a backlash. I attach the two responses.

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Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

From: Phyllis Wise [REDACTED]
Sent: Sunday, January 25, 2015 4:48 PM
To: Normand Paquin
Subject: Re: Quick question

I think you are fine with working with Mike and letting DD know that you are working with him.

From: Normand Paquin [REDACTED]
To: Phyllis Wise [REDACTED]
Sent: Sunday, January 25, 2015 2:55 PM
Subject: Re: Quick question

I should add that it is not clear that Bob was looped in on this.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Sun, Jan 25, 2015 at 2:53 PM, Normand Paquin <[REDACTED]> wrote:
Phyllis,

So sorry. I should have provided more details. We discussed this a long time ago. It was actually Susan Kies who contacted me and set things up for me to send D.D. materials to help the office put together the response for the President as a result of the BOT resolution. I was being asked for help but not really in an official manner. Time passed as I was swamped with our internal faculty issues. I did let D.D. know this was the case and that I would try to follow-up as soon as I could. As it turns out, so much time passed that I got Mike's request before I had sent anything to them.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Sun, Jan 25, 2015 at 2:44 PM, Phyllis Wise <[REDACTED]> wrote:
Normand,

Actually I don't remember DD asking you to send material to the BOT Health Systems committee. I think that there are too many cooks in the kitchen. I think that I would do exactly as you suggest, tell her that you are working through Mike. But this makes me wonder whether it is a good idea to send

all of the material that you send to Bob also to Tim Koritz. My suggestion there is to remind Bob that you have been asked by DD to send it to the HSC.

Phyllis

From: Normand Paquin <[REDACTED]>
To: Phyllis Wise <[REDACTED]>
Sent: Sunday, January 25, 2015 1:53 PM
Subject: Quick question

Phyllis,

You may recall that it was suggested I send D.D. Williams materials soon after the November 3 BOT Health systems subcommittee meeting. My inclination would be to call her and let her know I have been working through Mike after officially being approached by him. It seems to me I need to close that loop to leave good informal channels open in case we need them later. Any advice on this?

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED]

From: Phyllis Wise <[REDACTED]>
Sent: Sunday, January 25, 2015 10:13 PM
To: Normand Paquin
Cc: Adesida, Ilesanmi
Subject: Re: Just a heads up on Ed Pol

Good plan. I will meet you at the Bookstore at 2:10.

From: Normand Paquin
To: Phyllis Wise <[REDACTED]>
Cc: "Adesida, Ilesanmi" <[REDACTED]>
Sent: Sunday, January 25, 2015 6:52 PM
Subject: Re: Just a heads up on Ed Pol

Phyllis, Ade,

I just spoke to Gay. She is quite confident about the proposal passing either tomorrow or next week. She is just uncertain as to whether it would be better for us be there or not tomorrow. She will speak to Jerry McDonough tomorrow morning to see if email traffic over the weekend requires we take part ("we" here could be limited to chancellor and I if Ade cannot make it). If not, she may well plan on not having us unless discussions signal it would be better for us to join the group. She has observed in the past that it is sometimes easier to get people to wrap up discussions and vote when the sponsors are not there.

We tentatively agreed on the following:

She plans to discuss the proposal at 2:20 PM at the latest so there can be a minimum of 25 minutes for discussion.

We will be on standby. I suggest we meet at the bookstore entrance no later than 2:10.

If she decides we should come, she will send me a quick email or text. We can then then just walk over.

Can we make that work?

Normand. - I have a revised BOT draft. Reading it now. Will send later.

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Sun, Jan 25, 2015 at 5:00 PM, Normand Paquin <[REDACTED]> wrote:
Phyllis,

That's good to know. That provides options depending on what she says. The last time I discussed this with Gay, she was inclined to not have the sponsors present tomorrow. I believe the normal process calls for one session where a proposal is discussed internally without the sponsors being present. If the proposal requires no changes, they can vote there and then. If the proposal requires changes. Changes are made ahead of the next meeting , the sponsors are invited a the next meeting to discuss the changes and a vote is taken.

If we have the flexibility, we might be on standby nearby and she can call us in if she sees it as useful. I will provide an update as soon as I talk to her.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel [REDACTED]

On Sun, Jan 25, 2015 at 4:47 PM, Phyllis Wise <[REDACTED]> wrote:
Normand,

I have the Ed Pol committee meeting on my calendar for tomorrow. I thought you/Gay expected me there.

Phyllis

From: Normand Paquin [REDACTED]
To: "Adesida, Ilesanmi" [REDACTED]
Cc: Phyllis Wise [REDACTED] >
Sent: Sunday, January 25, 2015 3:20 PM
Subject: Just a heads up on Ed Pol

Ade,

Below is an email exchange I had with Gay this weekend. I am hopeful that Gay was just getting nervous about all the additions that were being made at the last second and how people might react. In any case, I left a message as well on her cell phone and I would certainly expect to be able to talk to her on Monday morning. Would your schedule still allow you to attend tomorrow's Ed Pol if needed?

I also called John hart who is ex-officio on Ed Pol. I know John from CS of course. He was not aware of any red flags.

Normand

--

Hi Gay,

I should be pretty much available all weekend except much of this morning as I run around taking care of some errands.

I'm perhaps more optimistic if consideration of the proposal is viewed in the proper context. Having said that, I still have the time blocked on my calendar and there may be an opportunity for Ade or the chancellor to be present.

In the discussions Ade and I had, the consensus seemed to be that there was tremendous upside but a sense that there was still a lot of uncertainty and risk. This is the key in my mind. Here is how I view this. Point 5 is the key in my mind. Please feel free to share with Jerry.

- 1) Ed Pol and the Senate has already given this their preliminary endorsement.
- 2) That the USSP is basically saying the proposed partnership between Carle and the campus is on sound footing with respect to the University Statutes
- 3) That the budget committee states firmly they don't see this college requiring new GRF or the reallocation of resources from other colleges. In fact, the budget can withstand tremendous financial shocks and still stand on its own. [Quite frankly, the scenarios we explored would be devastating for other colleges if this happened to them – see below]
- 4) Carle is looking for excellence here just as we are, has necessary capacity (I shared with Randy a comparison chart between Carle and U of Chicago. Carle does fine in the comparison) and is looking to grow and invest
- 5) Given the consensus that the creation of the College has tremendous transformative potential AND moving forward here is giving a chance for us to see this potential come through WHILE giving the founding dean and its faculty as well as the campus the chance to systematically remove uncertainties and minimize risks as next steps are undertaken over the next year and a half if not more, the spirit and mind of a great university faculty should dictate moving forward with little hesitation. This college will simply not be allowed to open its doors for business until it is accredited by the LCME, its curricula approved by Ed Pol and the senate, proper bylaws written and its financial viability established at a very high level of rigor. The committee should not feel they are taking a huge gamble in allowing the next steps to proceed.
- 6) The Committee may be taking a huge gamble if it elects not to because there may simply not be another chance to do this for a decade or more. In fact may very much want the senate to weigh in. Quite frankly, our peers are watching. As the letters indicate, they think this is a great idea. My Berkeley contacts are for the first time worried about us getting ahead in a way they will likely never be able to.

The College, when you look at others, will have wide felt benefits across the campus and community, complete

us in that a top tier university as a top tier university should have a college of medicine (all our dashboard peers do), and is important for reputation and standing in AAU,

Quick note: The Budget report expresses concern that the tuition is high. I can tell you that one scenario had tuition revenues going to the college reduced by 25%, fundraising falling short by 20%, research revenues falling short by 25%, the college having to pay 40% of employee benefits even for employees paid on state funds (which includes tuition) while still maintaining a 5% contingency on all expenses except research and the College finances were fine! Imagine that happening to other colleges? I did share the draft detailed Risk Analysis and Management Plan and a draft Risk Scenario Analysis to Steve Michael and invited him to ask me questions when Ade and I met with him. He has not asked any. He has that information in hand but may not advocate for us.

Best, Normand

Normand Paquin,
PhD, MBA
Associate
Director for Research
243 Coordinated
Science Laboratory, MC-228
1308 West Main
Street
Urbana, IL 61801
Tel: 217-244-6813

Fax: 217-244-1764

Email: paquin@illinois.edu

From:Miller, Gay Y
Sent:Friday, January 23, 2015 5:49 PM
To:Paquin, Normand
Subject:FW: 1/26 EPC Meeting

NOTE: document so far is draft.
So not to be shared publically yet.

Let's talk Monday morning or over the weekend. I am beginning to be worried about our decision to go without any sponsors on Monday. So many moving parts...

Thanks.

gym

Gay Y. Miller, DVM, PhD
Professor, Epidemiology and Preventive Medicine
Adjunct Professor, Agricultural and Consumer Economics
2001 S Lincoln Ave
Veterinary Medicine Basic Science Building
Urbana, IL 61802
Phone: 217-244-3090

FAX: 217-244-7421

Email: GYMiller@illinois.edu
URL: http://vetmed.illinois.edu/~gymiller/

From: Roether, Jenny
Sent: Friday, January 23, 2015 5:32 PM
To: Beacham, Amanda Prester; Bellini, Michel; Carney, Karen M;
Clevenger, Brenda M; Dhillon, Pradeep A; Francis, Bettina M; Geil, Phillip H;
Hart, John C; Hill, Matthew D; Hopkins, Shari Lynne; Kling, Gary J; Kuntz,
Kristi A; Marshall, Keith A; Martensen, Kathy; McCarthy, Randy; McDonough,
Jerome P; Meyer, Dean Matthew; Meyer, Eric K; Michael, Steven C; Miller, Gay Y;
Prussing, John E; Sianis, Sofia George; Tyson, Jeremy; Wander, Michelle M;
Woronowicz, Andrew R
Cc: Edwards, Amy Lee; Hoewing, Rodney E; McKinney, Allison Ann;
Schaefer, Melinda M; Tucker, Charles L III
Subject: 1/26 EPC Meeting

The next meeting of the Senate Committee on Educational Policy is Monday, January 26 at 1:10 pm in room 232 of the English Building. Please find attached the meeting agenda and a draft of the December 1, 2014 minutes.

Please note that EP.15.33* has been updated and now includes a signed signature page along with letters of support from:

1. John W. Erdman, Chair ISHI Advisory Committee
2. James C. Leonard, President and CEO, The Carle Foundation
3. Senate Committee on the Budget
4. William Maher, Chair Senate Committee on University Statutes and Senate Procedures (USSP)

*Please note that until proposal EP.15.33 has been formally approved by the EPC, it is considered a draft. Draft documents are not considered public documents.

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED]

From: Normand Paquin [REDACTED]
Sent: Monday, January 26, 2015 8:53 PM
To: Phyllis Wise
Subject: Re: Fwd: Introduction of someone who I believe can help at this stage

We will definitely pursue the UT-Austin angle.

On Jan 26, 2015 8:43 PM, "Phyllis Wise" [REDACTED] wrote:
Normand,

It's a complete surprise to me also. I told him that I thought we would take the next steps without another consultant. But it won't hurt to talk with him. I still say that if we are going to be consulting with anyone it should be a current or former dean from a peer institution ("you are who you associate with"). That is why I urged you to let me or you talk with the person who is working with UT Austin.

Phyllis

From: Normand Paquin <[REDACTED]>
To: Phyllis Wise [REDACTED]
Sent: Monday, January 26, 2015 8:29 PM
Subject: Fwd: Introduction of someone who I believe can help at this stage

Phyllis,
This is a surprise. I'll talk to John but will keep my options open.
Normand

----- Forwarded message -----

From: "Paul Umbach" <PUMBACH@TRIPPUMBACH.COM>
Date: Jan 26, 2015 7:45 PM
Subject: Introduction of someone who I believe can help at this stage
To: "Normand Paquin" <[REDACTED]>
Cc: [REDACTED]n" [REDACTED]m, "Dailey, John T. (jdaile@lsuhsc.edu)"
<jdaile@lsuhsc.edu>

Dear Brother Normand,

I am so excited about all of the green lights in your road to developing your (our) medical school project. I had a great call with my sister Phyllis and we did talk about the critical role you have played to move things forward. Without you this would just not happen. Yes, there is much work to be accomplished with getting this rocket into space – dean search, LCME prep, finding \$100+ million. Oh, well, but you knew that all along. I was thinking tonight about your project and sincerely believe that although I would love there to be a role for Tripp Umbach, the best thing I can do is to introduce you to my dear friend John Daily (his email is attached to this email and his direct phone number is [REDACTED])

John has been my client at the LSU medical school for several years where he serves as Vice Chancellor. John has everything you need at this point in the project as he is a respected healthcare lawyer (the Carle people will love that), politically savvy (always a nice gift to have in Illinois), knows everything there is to know about academic medicine, having also held medical school leadership positions in Maryland and Florida, and has great contacts nationally. Mostly he is a brother that you can trust to give guidance horsepower as you move post-March and pre-dean.

While he is a Tripp Umbach senior consultant, and as such could work through us, I would much rather you and Phyllis talk with John directly about how he could help – and if so, work with him directly as a contractor or even full time as appropriate.

Thanks for considering spending a few minutes by phone with John as I sincerely believe it will be valuable at this junction.

Please keep in touch.

Sincerely,

Paul

Paul O. Umbach
Founder and President

Tripp Umbach
2359 Railroad St. #3701
Pittsburgh, PA 15222
Corporate Headquarters: 412.281.2313

Cell Number: [REDACTED]
Fax Number: 412.281.9946
www.trippumbach.com

“Turning ideas into action for 25 years”

From: Normand Paquin [mailto:[n\[REDACTED\]](mailto:n[REDACTED])]
Sent: Monday, January 26, 2015 5:43 PM
To: Paul Umbach
Subject: Education Policy Committee passes proposal

Hi Paul,

I thought you would like to know the faculty Ed Pol Committee passed to proposal to create the college of medicine. Thanks again for all your help getting us here.

Phyllis shared with me that you had some very kind words to say about me. Many thanks.

I got to say, it seems a bit miraculous we have made it this far. And with the changes in the BOT, I'm actually seeing the light at the end of the tunnel. (Or at least the first tunnel. I guess the LCME might be another!) :)

Hope you are doing great my friend.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

From: Normand Paquin [REDACTED]
Sent: Tuesday, January 27, 2015 9:57 AM
To: Phyllis Wise
Subject: Dates for UC-Riverside founding dean visit were not set in stone

Phyllis,

When I asked how firm were the dates, Steph said they could and should be changed if neither you or Ade could take part. I suspect they realized after the-fact that we needed to be included and are making up for it as best as they can. Not quite right of course but not as bad as it could be.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED] 

From: Phyllis Wise [REDACTED]
Sent: Tuesday, January 27, 2015 4:33 PM
To: Normand Paquin
Subject: Re: Text of email to Mike

great email! great material!

From: Normand Paquin <[REDACTED]>
To: Phyllis Wise [REDACTED]
Sent: Tuesday, January 27, 2015 1:18 PM
Subject: Text of email to Mike

Phyllis,

For completeness, here is the text of the email to Mike to which the files were attached.

Dear Mike,

As per our conversation, I have been thinking about what additional documents that might be helpful. Developing some of the attached drafts is an ongoing effort but it seemed to me that it would be good to make you aware of these at this time. If I'm incorrect in my thinking, please don't feel any need to consider these further.

First, it occurred to me that you might benefit from having a word version of the Tripp Umbach final report. It is attached. If you think you would find it beneficial to have a word version of the feasibility report, please let me know. I will see if I can find a copy.

Second, I provide three draft documents:

The Risk Mitigation draft has a good discussion on risk mitigation. We have looked at this intensively. I realize that you will be considering this from the perspective of the University as a whole but you may find it useful to look at this piece.

I like the Current situation draft because it looks forward, not backwards and thus strikes a positive tone. It has some additional data regarding the state relevant to the discussion that you may not have on hand and a quite compact description of how things work today.

The Recommendation and Budget draft may prove useful in providing a succinct view of the budget plan based on what we believe should happen.

I think this is about all the materials I have that you
might not already have. If you think I can be of further assistance do
let me know.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED]

From: Phyllis Wise [REDACTED]
Sent: Tuesday, January 27, 2015 4:35 PM
To: Normand Paquin
Subject: Re: Note on passage

You (plural) are amazing!!!

From: Normand Paquin <[REDACTED]>
To: Phyllis Wise <[REDACTED]> "Adesida, Ilesanmi" <[REDACTED]>
Sent: Tuesday, January 27, 2015 1:28 PM
Subject: Note on passage

Phyllis, Ade,

Gay just confirmed that passage of the proposal through Ed Pol was unanimous. That's pretty extraordinary considering who is on that committee.

Ade - Gay also shared with me that our meetings with subcommittee chairs and Randy were probably really important to our success. Thank you for making the time and being such a good spokesperson for the college.

Best, Normand

Dr. Normand Paquin
Skype: normand_paquin

Te [REDACTED]

From: Normand Paquin [REDACTED]
Sent: Wednesday, January 28, 2015 6:43 PM
To: Ilesanmi Adesida
Cc: Phyllis Wise
Subject: Re: Note on passage

Yes. I was not excited by his email. I think it speaks to the need to do more here. It will be one of the topics we will discuss during our regular COM 9 AM Friday meeting. I know you will not be there but I have the meeting on Phyllis' calendar. I'm looking forward to ideas from the team.

Normand

Dr. Normand Paquin
Skype: normand paquin
Tel: [REDACTED]

On Wed, Jan 28, 2015 at 3:17 PM, Ilesanmi Adesida <[REDACTED]> wrote:
Normand,

I spoke with Steve yesterday briefly and I also called him today. In turn, he wrote an email to his EO's. I forwarded the email to you. I wish he had put it completely in his voice rather than saying that the Provost wanted them to do something. I will actually call Susan Martinis, Head of Biochem, also.

Ade

On Wed, Jan 28, 2015 at 3:10 PM, Normand Paquin <[REDACTED]> wrote:
That's great. Thank you Ade. Paul Hergenrother spoke calmly by convincingly about MCB faculty feeling left out of the process. I believe you spoke to Prof. Steve Sligar this morning (I happened to be in the Provost's office and heard Deb was connecting you). Did it go well? We may need to do more next week.

Best, Normand

Dr. Normand Paquin
Skype: normand paquin
Tel: [REDACTED]

On Wed, Jan 28, 2015 at 3:04 PM, Ilesanmi Adesida <[REDACTED]> wrote:
Thanks, Normand. Progress all around. I am talking to Deans and Heads about Senators coming to Feb 9 Senate meeting. Will keep talking. Aluta continua!

Ade

On Tuesday, January 27, 2015, Normand Paquin <[REDACTED]> wrote:

Phyllis, Ade,

Gay just confirmed that passage of the proposal through Ed Pol was unanimous. That's pretty extraordinary considering who is on that committee.

Ade - Gay also shared with me that our meetings with subcommittee chairs and Randy were probably really important to our success. Thank you for making the time and being such a good spokesperson for the college.

Best, Normand

Dr. Normand Paquin

Skype: normand_paquin

Tel: [REDACTED]

From: John Dailey <[REDACTED]>
Sent: Wednesday, January 28, 2015 7:12 PM
To: [REDACTED]
Cc: PUmbach@trippumbach.com; [REDACTED]
Subject: thanks

Dr Paquin,

Thanks for your note. I look forward to our speaking when things quiet down sometime after February 9th. There's certainly no rush on my end. Hope all's well and that you have a good evening.

John

John Dailey, JD MPA

[REDACTED] cell

From: Normand Paquin [REDACTED]
Sent: Tuesday, January 27, 2015 7:38 AM
To: Paul Umbach
Cc: [REDACTED] Dailey, John T.
Subject: Re: Introduction of someone who I believe can help at this stage

Hi Paul,

Thank you very much for introducing John. I look forward to talking to him about how he might be able to help us.

John - if it is alright, I will aim to get in touch after we get through our Academic Senate (February 9th). Things will remain rather hectic until then.

All the best,

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Mon, Jan 26, 2015 at 7:45 PM, Paul Umbach <PUmbach@trippumbach.com> wrote:

Dear Brother Normand,

I am so excited about all of the green lights in your road to developing your (our) medical school project. I had a great call with my sister Phyllis and we did talk about the critical role you have played to move things forward. Without you

this would just not happen. Yes, there is much work to be accomplished with getting this rocket into space – dean search, LCME prep, finding \$100+ million. Oh, well, but you knew that all along. I was thinking tonight about your project and sincerely believe that although I would love there to be a role for Tripp Umbach, the best thing I can do is to introduce you to my dear friend John Daily (his email is attached to this email and his direct phone number is [REDACTED])

John has been my client at the LSU medical school for several years where he serves as Vice Chancellor. John has everything you need at this point in the project as he is a respected healthcare lawyer (the Carle people will love that), politically savvy (always a nice gift to have in Illinois), knows everything there is to know about academic medicine, having also held medical school leadership positions in Maryland and Florida, and has great contacts nationally. Mostly he is a brother that you can trust to give guidance horsepower as you move post-March and pre-dean.

While he is a Tripp Umbach senior consultant, and as such could work through us, I would much rather you and Phyllis talk with John directly about how he could help – and if so, work with him directly as a contractor or even full time as appropriate.

Thanks for considering spending a few minutes by phone with John as I sincerely believe it will be valuable at this juncture.

Please keep in touch.

Sincerely,

Paul

Paul O. Umbach

Founder and President

Tripp Umbach

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Pittsburgh, PA 15222

Corporate Headquarters: [412.281.2313](tel:412.281.2313)

Cell Number: [REDACTED]

Fax Number: [412.281.9946](tel:412.281.9946)

www.trippumbach.com

“Turning ideas into action for 25 years”

From: Normand Paquin [mailto: [REDACTED]]
Sent: Monday, January 26, 2015 5:43 PM
To: Paul Umbach
Subject: Education Policy Committee passes proposal

Hi Paul,

I thought you would like to know the faculty Ed Pol Committee passed to proposal to create the college of medicine. Thanks again for all your help getting us here.

Phyllis shared with me that you had some very kind words to say about me. Many thanks.

I got to say, it seems a bit miraculous we have made it this far. And with the changes in the BOT, I'm actually seeing the light at the end of the tunnel. (Or at least the first tunnel. I guess the LCME might be another!) :)

Hope you are doing great my friend.

Normand

Dr. Normand Paquin

Skype: normand_paquin

Tel: [REDACTED]

From: [REDACTED] on behalf of [REDACTED]
Sent: Saturday, January 31, 2015 11:42 PM
To: Scott Rice
Subject: Re: thanks

What the....????

----- Original Message -----

From: "Scott Rice" [REDACTED]
To: "Robin Kaler" [REDACTED]
Sent: Saturday, January 31, 2015 10:19:27 PM GMT -06:00 US/Canada Central
Subject: Fwd: thanks

Huh

Begin forwarded message:

From: Phyllis Wise <[REDACTED]>
Date: January 31, 2015 at 10:15:54 PM CST
To: Nick Burbules <[REDACTED]>, Joyce Tolliver <[REDACTED]>
Cc: Rice Scott <[REDACTED]>, Ilesanmi Adesida <[REDACTED]>
Subject: thanks
Reply-To: Phyllis Wise <[REDACTED]>

Dear Nick and Joyce,

[REDACTED] I can see your influence on it. Thank you for your continued input and work. I don't know what I would do without your efforts. I don't quite know how you both do everything else that you must do as faculty - your teaching and your scholarship. Suffice it to say that I hope we can bring this to closure, in part, so that you (and we) can get back to working on the long term future of the university.

One more request on a completely different issue: the new COM. I do not have Roy's personal email or I would send my request directly to him. It would be wonderful if the COM discussion and vote could be the first item on the agenda for the February 9th (and perhaps the February 2 SEC) Academic Senate meeting. I will be away all this week except for Friday afternoon. I will be in Springfield on the morning of February 9 so we will not have our ordinary prep for the Senate meeting. There will be several people who are there specifically for this issue and who will ask for floor privileges. I think it is only fair to allow them to leave after this issue is discussed.

Ade, Normand, Rashid, Reggie and I have or are meeting with several faculty groups who may have questions or concerns. I hope we can allay their fears that they will be left out or what if the UIC COM closes down. This may come up at the full senate meeting, but I don't think it will.

Regardless, I think the CAFT and AAUP discussions will change the tenor of the meeting to be negative and I would prefer that the COM discussion not be tied into knots because of that.

Thanks again,
Phyllis

From: Ilesanmi Adesida [REDACTED]
Sent: Tuesday, February 03, 2015 4:57 PM
To: Phyllis M Wise
Cc: Normand Paquin
Subject: Re: Jim observations

Thanks, Normand.
Ade

On Tue, Feb 3, 2015 at 4:45 PM, Phyllis M Wise [REDACTED] wrote:
Thanks.

Sent from my iPhone

On Feb 3, 2015, at 4:22 PM, Normand Paquin <[REDACTED]> wrote:

Phyllis, Ade,

This is a bit long, but it will give you a sense of where we are.

Jim has an appreciation of the politics and what can be said in public versus what cannot. He has appreciated the statements made by Ade as well as those that were passed along to him from the chancellor's meeting last Friday.

He did revisit your Dec. 19 meeting which he said [REDACTED]

Two things in particular came through

- 1) The MD/PhD Scholars program is as much ours as it is UIC's. He feels UIUC has a real responsibility there.
- 2) He says anyone who knows anything about the situation in this community would conclude it is not possible for two colleges of medicines to coexist here. He understands the situation will be different but Carle will hire physicians in the specialties it wants and not all expected clinical rotation opportunities will be available at Carle. He also doesn't think it makes much sense to have two MD/PhD programs side by side.

I don't necessarily [REDACTED]

He plans to speak on Monday. He basically agrees the worse thing that could happen to the College of Medicine is for nothing to happen. He also realizes that the time is now or it will not happen. I very much encouraged him not to make statements that might lead to the impression this should be studied for another two years. I told him the support needed to be strong.

I asked him what I could have done better with respect to [REDACTED]

[REDACTED] I expressed frustration that much of the misconceptions of MCB being left out could have easily been solved by adding a couple of paragraphs to the business plan about the biosciences role. Jim volunteered that [REDACTED]

[REDACTED] Jim suggested [REDACTED]

[REDACTED] We should not attribute this to Jim but we should take note. Jim noted that many in MCB sees the College as "rightfully theirs" (ah, the problems of changing an ingrained culture).

With respect to my statement yesterday [REDACTED]

Normand

Dr. Normand Paquin

Skype: normand_paquin

Tel: [REDACTED]

From: [REDACTED] and Dan Peterso
Sent: Thursday, February 05, 2015 7:59 AM
To: Dan Peterson
Subject: Fwd: [REDACTED]

Begin forwarded message:

From: Phyllis Wise [REDACTED]
Date: February 4, 2015 at 8:59:28 PM CST
To: Dan Peterson [REDACTED], Tracy Molly [REDACTED]
Subject: [REDACTED]
Reply-To: Phyllis Wise [REDACTED] >

I met with [REDACTED] in his office today. We talked about the state of the state, the new governor, the new president, the new chair of the BOT and what that means to us, and particularly to the COM. I told him we were preparing for big budget cuts during Rauner's first two years, but were counting on the fact that he was all about economic development and would appreciate how we were his engine to meet that goal. I reminded him that Bruce was a member of the SAB [REDACTED] and my conversations and connections with him (transition committee, TL dinner, inauguration).

We spent most of the time talking about the COM. I told him that we had made very significant progress. We reviewed that the BOT would vote in March. He asked some important questions.

1. He said that he believes that [REDACTED]

2. He said that there would be huge opportunities for us to have our own NCR designated Center of Excellence in Cancer and that it should be based on research intensive cancer work. He said there was a lot of money coming in that area. We should convey this to Rashid.

3. He asked whether we were going to be limited in other partnerships that we developed. I said no: [REDACTED]

4. He asked about what we had agreed to relative to IP. I told him that we had made a general statement in the MOU but this was an area that we need to work on in the definitive agreements.

5. We talked about the impact of the COM on economic development. He said that he [REDACTED] on economic development and the convergence of engineering and medicine. I have read the article but could not find it this afternoon to send to you. It's a beautiful article. We talked about our ED report and the clusters and the four cities that we sought to become and what they shared in common.

6. He said that he has been doing everything he can in [REDACTED] to talk about the relationship between engineering and medicine. He really gets that we are creating something very unique.

7. Most importantly we talked about our quest to raise \$150-200M in philanthropy. I told him that I was not there to make an ask but that I did want to tell him what we would aim for. I told him that we had submitted a proposal to [REDACTED]. He asked how much and how the [REDACTED] works. I told him that we would probably give the COM the name Carle Illinois COM but that we had agreed that if there was a donor who wanted to name the college that we both agreed to change the name to honor the donor [REDACTED]. I said I realized that, but that I hoped he would be passionate enough about what we were doing to give a significant gift. He did not flinch or object. I told him that we were not going to try to change the loyalty of donors to their colleges, but with him we

could think about a gift that would allow us to move the endowed professorship to and endowed chair and also fund activities that would benefit both [REDACTED] he seemed to understand.

8. We talked about the sesquicentennial and the campaign in the context of raising \$200M for the COM.

9. We talked a little bit about agriculture and GMOs and how all the money is behind GMOs and no one is there to counter it. He told me he thought [REDACTED]

[REDACTED] had never heard about it before. He said it is the new GMO - it really isn't GMO, but he thinks that the GMO lobby will make it that. He recommended that [REDACTED] [REDACTED] He said he was on a panel with him and he was amazing. I don't know who would know him - but someone in our Chemistry Department should.

10. I reminded him about the SAB and he said it was on his calendar.

Follow up: we need to figure out when to make an ask and how much it should be for.

Phyllis

From: [REDACTED]
Sent: Thursday, February 05, 2015 6:58 PM
To: Phyllis Wise
Cc: Ed McMillan
Subject: Re: Send notice to Executive Search Committee and Hay?

I am doing everything I can think of to arrive there! Quite the political stew, but I am hopeful. Would like to set new precedent for quality rather than patronage.

Sent from my iPhone

On Feb 5, 2015, at 4:44 PM, Phyllis Wise [REDACTED] wrote:

Ditto from me. You really need a great person for this position.

From: Ed McMillan <[REDACTED]>
To: 'Jennifer Woodard' [REDACTED] Phyllis Wise [REDACTED]
Sent: Thursday, February 5, 2015 4:19 PM
Subject: RE: Send notice to Executive Search Committee and Hay?

Best wishes for a very successful search conclusion!!!

Ed

Ed McMillan
McMillan L.L.C.
105 North Third Street, Suite 204
Greenville, IL 62246
Office 618-664-9600
Cell [REDACTED] 7

From: Jennifer Woodard [mailto:[REDACTED]]
Sent: Thursday, February 05, 2015 4:04 PM
To: Phyllis Wise; Ed McMillan
Subject: Fwd: Send notice to Executive Search Committee and Hay?

We are moving forward. Thank you both for your support. It is a challenging, albeit hopeful, time!

Jennifer

----- Forwarded message -----

From: Heather Tarczan <htarczan@medicaldistrict.org>
Date: Thu, Feb 5, 2015 at 3:53 PM
Subject: Send notice to Executive Search Committee and Hay?
To: Jennifer Woodard <[REDACTED]>

Hi Jennifer –

Would you like me to reach out via email to the search committee that the release is going out and that any calls they receive they should direct to myself or William E. Hay & Co.?

Please advise, thank you.

-hmt

IMDC Establishes Search Committee for New Executive Director *Leadership from District Hospitals and Chicago Community Trust Tasked*

CHICAGO (Feb. 5, 2015) – The Illinois Medical District Commission (IMDC) today announced formation of a Search Committee to select an Executive Director. The Committee will be comprised of seven members representing the IMDC and its major partners. Members of the Committee are:

- Jennifer Woodard, IMDC President, Chair
- Dan Trevino, IMDC Secretary
- Terri Weaver, PhD, RN, Dean, College of Nursing, University of Illinois Chicago
- Michelle Blakely, Associate Medical Center Director, Jesse Brown VA Medical Center
- Letitia Close, Chief of Staff, Cook County Health & Hospital System
- Michael Dandorph, Executive Vice President & Chief Operating Officer, Rush University Medical Center
- Terry Mazany, President, Chicago Community Trust

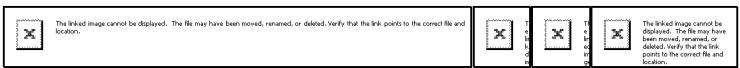
The Committee will be assisted in its search by the firm of William E. Hay & Co.

"Our partners, who have been critical to our success, are represented on the committee to ensure an inclusive and transparent search process," said Jennifer Woodard, IMDC President and Chair of the Search Committee. "I am confident that we will be able to identify the Executive Director who will help us to achieve the vision that we defined together in our strategic plan."

An organizational meeting of the Search Committee will be scheduled for February to establish the search framework and timeline. President Woodard expressed her appreciation to outgoing Executive Director Warren Ribley and to Dennis Sienko who has agreed to serve in an interim capacity.

###





From: Peter B. Fox <peterf@fox-companies.com>
Sent: Friday, February 06, 2015 10:44 AM
To: James C. Leonard (james.leonard@carle.com); Lykins, Greg
(Gregory.Lykins@busey.com); Rick L. Stephens (rick@investres.net)
Cc: Phyllis Wise
Subject: FW: Greenville Health System
Attachments: Greenville Health System (15.4 KB)

Recent memo from a friend

[REDACTED] was ceo of [REDACTED] and is also chair of the [REDACTED]

As a hobby he owns the [REDACTED]

I am meeting with the person he references next week

I wonder if we should look for someone similar

Someone with real deal experience



Peter B. Fox

Chairman

1909 Fox Drive

Champaign, IL 61820

O: 217-351-1430 ext. 15 | C: [REDACTED]

peterf@fox-companies.com

www.fox-companies.com

From: Peter B. Fox <peterf@fox-companies.com>
Sent: Friday, January 16, 2015 10:32 AM
Subject: Greenville Health System
Attachments: Greenville Health System (14.1 KB)

From: [REDACTED]
Sent: Friday, January 16, 2015 10:08 AM
To: Peter B. Fox
Subject: Greenville Health System

Peter,

Happy New Year! I hope this note finds you well. I'm afraid George Maynard jumped the gun somewhat yesterday as I wanted to ask you for a favor that I know you are uniquely qualified to help with. As you know GHS as part of its new medical school is actively pursuing the establishment of a research corridor (think new enterprise development) that will become one of the pillars of its new Academic Health Center and a further engine of growth for Greenville's emerging entrepreneurial eco-system and the Upstate economy. The corridor will have many parallels with a tech transfer operation in a University and also with some activities that normally would be associated with a University research park---all areas where you are expert.

San Konduras is heading up this initiative for GHS. Sam is an experienced business oriented lawyer with much relevant experience in assembling partnerships between the public and private sectors and is also very familiar with the International Center for Automotive Research (ICAR) which represents a joint venture between BMW and Clemson. Given my experience over the past 10 years with tech transfer and new enterprise development with MSU I've been doing my best to help Sam on some of the challenges and opportunities he is facing and also to be an objective sounding board as he builds his team. I know you could be a huge resource for him and GHS if you were willing to do so, particularly as you pass through Greenville from time to time.

I'd be happy to speak with you further about this initiative or alternatively simply put you in contact with Sam so you could have a direct conversation with him. I know he'd like to speak with you. Let me know what you think and how you'd like me to handle the introduction.

Best regards,

[REDACTED]

From: \\"Roether, Jenny\\" on behalf of \\"\\Roether, Jenny\\\" (jtempel@illinois.edu via senate Mailing List) <senate@lists.illinois.edu>
Sent: Friday, February 06, 2015 9:07 PM
To: senate@lists.illinois.edu; jtempel@illinois.edu
Subject: UPDATE: Feb 9 Senate Meeting

In the original email for the Feb 9 Senate meeting, the online .pdf of EP.15.33 Proposal to Create a College of Medicine at the University of Illinois at Urbana-Champaign in Partnership with Carle Health System was missing a very important letter of support from the Academic Deans. This letter is now included in EP.15.33 and in the renumbered Senate Packet.

Agenda: <http://www.senate.illinois.edu/20150209a.asp>

Packet: <http://www.senate.illinois.edu/20150209packet.pdf>

Jenny Roether
Senate Clerk
Office of the Senate
University of Illinois at Urbana-Champaign
228 English Building, MC-461
608 S. Wright St.
Urbana, IL 61801
217.333.5525 ph
217.333.4848 fax
Email: jtempel@illinois.edu
<http://www.senate.illinois.edu>

Under the Freedom of Information Act (FOIA), any written communication to or from University employees regarding University business is a public record and may be subject to public disclosure.

From: Normand Paquin [REDACTED]
Sent: Saturday, February 07, 2015 4:46 PM
To: Phyllis Wise
Subject: Observation of note
Attachments: University of Chicago comparison 2015-01-20.docx

Phyllis,

I gather that Phil Sharp expressed concerns that Carle may not have the capacity to provide the clinical rotations needed.

I think this may well be based on what has been communicated by members of the existing COM and those predisposed, such as Dave Kranz, to complain about Carle.

Jim Slough's reasoning to justify his belief that two programs could not co-exist is largely based on what he has experienced: for clinical rotations such as Ob/Gyn, he's had to find tiny remote clinics to place his students. Jim feels even with 1) the fact we budget for the clinical training and won't rely on volunteers and 2) Carle plans to increase its physicians by a net of 130-150 physicians, he does not see this situation changing because Carle, "Will hire only in the areas of interest to them and thus leave out important clinical rotations." [... Presumably implying that the two colleges would be competing for sites to complete their students education.]

I spoke to Joe Barkmeier about this. I don't quite have the heart to tell Jim what Joe told me. He said Carle has plenty of Ob/Gyn specialists. It's not even a matter of money. They do not nor do they want any association with the current UIC college of medicine, and don't see why they should impose their patients to students from that school. This will change completely with the new College.

Finally, If the fact that Carle simply blowing away UIH with respect to numerous measures of patient activity is not enough (remembering that UIC admits ~175 students per year at the Chicago campus), Carle's levels of activity compare well with the University of Chicago Hospital (see attached). The U. of C. school of medicine admits about 90 students per year and is of course very well ranked.

Dan thought it would be important to share this with you.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED] 

From: Normand Paquin [REDACTED]
Sent: Sunday, February 08, 2015 7:15 AM
To: Phyllis Wise
Subject: Re: Observation of note

Phyllis,

OK. On a different note, Jim Leonard's BOT is scheduled to be on March 11 and 12th. His availability may be limited.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Sat, Feb 7, 2015 at 7:28 PM, Phyllis Wise [REDACTED] > wrote:
Phil's concern was not do to any limitations in clinical rotations, just not reputational our peer. I'll explain more when we have a chance to talk.

From: Normand Paquin [REDACTED]
To: Phyllis Wise [REDACTED]
Sent: Saturday, February 7, 2015 4:46 PM
Subject: Observation of note

Phyllis,

I gather that Phil Sharp expressed concerns that Carle may not have the capacity to provide the clinical rotations needed.

I think this may well be based on what has been communicated by members of the existing COM and those predisposed, such as Dave Kranz, to complain about Carle.

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Dan thought it would be important to share this with you.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

From: Jennifer Woodard [REDACTED]
Sent: Monday, February 09, 2015 3:37 PM
To: Phyllis Wise [REDACTED]
Subject: [REDACTED]

[REDACTED]
[REDACTED] did a dozen deals in the last year alone, making him one of the top angel investors in Chicago tech startups. You wouldn't know it from his website.

This message was sent using ShareThis (<http://www.sharethis.com>)

I think he might be potential COM investor. Talk to Andreas who knows him.

Best,

Jennifer

From: Phyllis Wise [REDACTED] >
Sent: Monday, February 09, 2015 10:52 PM
To: Peter B. Fox
Subject: Re: Faculty group endorses U of I medical school plan - News - The State Journal-
Register - Springfield, IL

This was a historic day!

Sent from my iPad

> On Feb 9, 2015, at 8:38 PM, "Peter B. Fox" <peterf@fox-companies.com> wrote:

>

> Well done!!

> <http://m.sj-r.com/article/20140917/News/140919576>

>

>

> Sent from my iPhone

> Peter B. Fox

> 1909 Fox Drive

> Champaign, IL 61820

> O: 217-351-1430 ext. 15 | C: [REDACTED] peterf@fox-companies.com

> www.fox-companies.com

From: Phyllis Wise [REDACTED]
Sent: Tuesday, February 10, 2015 11:15 PM
To: Paul Umbach
Cc: Normand Paquin; Ryan, Kenneth J - (kjryan) (kjryan@email.arizona.edu); Ha Pham; Beth Paul
Subject: Re: Academic Senate approves creation of the College!

Dear dear Paul and colleagues,

I am so glad that Normand wrote to you and told you of our great step forward yesterday. People who are not familiar with higher education and the unique characteristics of a faculty/academic senate won't appreciate the incredible amount of work that it took to get this passed with an almost unanimous vote. Normand was an inspirational, steady, patient/impatient leader. This would not have happened without his unflagging attention to the big picture and every detail.

Now we are on to the University Senate Committee (a small group of faculty from all three campuses) where President Easter is likely to get criticism from the UIC faculty. This is only advisory. And then on to the Board of Trustees on March 11. There are steps after that but I feel the train will have really left the station.

You built the train. We would be nowhere without you!

Warm wishes,
Phyllis

Sent from my iPad

On Feb 10, 2015, at 7:00 PM, Paul Umbach <PUMbach@trippumbach.com> wrote:

Wonderful news brother Normand! SO proud of your accomplishment – a testimony of both your excellent encouragement gifts and hard work. Please continue to keep us in the loop as you move forward. We will have a celebration dinner when appropriate after the board meeting in March – please share with Phyllis that a special trip will be planned. ☺

Paul O. Umbach

Founder and President

Tripp Umbach

2359 Railroad St. #3701

Pittsburgh, PA 15222

Corporate Headquarters: 412.281.2313

Cell Number: [REDACTED]

Fax Number: 412.281.9946

www.trippumbach.com

"Turning ideas into action for 25 years"

From: Normand Paquin [mailto:[REDACTED]]
Sent: Tuesday, February 10, 2015 10:16 AM

To: Paul Umbach; Ha Pham; Beth Paul
Subject: Academic Senate approves creation of the College!

Beth, Ha, and Paul,

I am so pleased to let you know the Senate gave overwhelming approval for the creation of the college of medicine. I was really delighted by the significant number of key individuals who spoke in favor and how great they thought the idea was.

Here's the link to the news Gazette article: <http://www.news-gazette.com/news/local/2015-02-09/senate-oks-urbana-medical-school.html>

All the best,

Normand

Dr. Normand Paquin

Skype: normand_paquin

Tel: [REDACTED] <image001.png>

From: [REDACTED] and Dan Peterso
Sent: Tuesday, February 17, 2015 7:02 AM
To: Dan Peterson
Subject: Fwd: a few unrelated items

Begin forwarded message:

From: Phyllis Wise <[REDACTED]>
Date: February 17, 2015 at 6:34:14 AM CST
To: Ed McMillan <[REDACTED]>
Cc: [REDACTED] and Dan Peterso <[REDACTED]>
Subject: Re: a few unrelated items
Reply-To: Phyllis Wise <[REDACTED]>

Dear Ed,

Please excuse my piecemeal way of communicating through this email. But I did want to add that the goal for our conversation on March 11 is to brainstorm with you about our next campaign and ACES (and therefore naming the dean) under this umbrella. If we take our vision statement ("We will be the pre-eminent public research university with a land grant mission and global impact") really seriously. We take the campaign as a vehicle to make this vision statement a reality. When you break this down further, if we do not have pre-eminence in the College of LAS, Engineering, Business, and ACES (and in the future in Medicine), you cannot get to this goal.

This is a long way of saying what we want to talk about with you on March 11 is overall campaign planning, and what is needed for ACES and the other big four colleges to bring UIUC to the level of pre-eminence, respect, prominence, and have the global impact that we want to have.

Phyllis

From: Phyllis Wise <[REDACTED]>
To: Ed McMillan <[REDACTED]>
Cc: [REDACTED] and Dan Peterso <[REDACTED]>
Sent: Monday, February 16, 2015 9:54 PM
Subject: Re: a few unrelated items

Dear Ed,

Thank you for getting back to me on this. Even if you do not feel comfortable leading the process, and we can completely understand that given your role as chairman of the BOT, we would love to brainstorm with you about whether this is a good idea, ideas about who might be the appropriate person, any role that you would like to play.

Maybe we can talk about this on March 11.

thanks again,
Phyllis

From: Ed McMillan <[REDACTED]>
To: Phyllis Wise <[REDACTED]>

Sent: Monday, February 16, 2015 6:59 PM
Subject: Re: a few unrelated items

I am not comfortable [REDACTED]

Ed McMillan
McMillan L.L.C.
105 North 3rd St., Suite 204
Greenville, IL 62246
618-664-9600

On Nov 24, 2014, at 8:20 PM, Phyllis Wise <[REDACTED]> wrote:

Dear Ed,

Endowing the dean is \$5M; endowing the head of the Department of Animal Sciences is \$3M. We can do this with commitments that can be fulfilled over a 5 year period. In either case, it will take one or two "lead" donors that jump start the effort and make it clearly feasible. But I would really like to talk with you about the details when we have more time. It's better than email exchanges.

I had an interesting conversation with Susan Kies today about the transition and who is trying to get to Tim Killeen's ears.

My meeting with Bob went pretty well. We will be able to give the USC and Bob a proposal in time for the USC to consider it at their February meeting.

Now just enjoy Thanksgiving,
Phyllis

From: Ed McMillan
To: Phyllis Wise
Sent: Monday, November 24, 2014 8:12 AM
Subject: Re: a few unrelated items

Yes, we need to seriously discuss it. How much will it take to fully endow it! Another idea would be to endow the An Sci dept chair.

Ed McMillan
McMillan LLC

On Nov 23, 2014, at 11:51 PM, Phyllis Wise <[REDACTED]> wrote:

Dear Ed,

First, thanks for letting me know about [REDACTED]. Actually I suspect that with all the names I have heard about [REDACTED]

[REDACTED] and numerous others being presented by the UIAA - [REDACTED] is the name I hear most often), I don't think [REDACTED] will be competitive.

Second, I have a meeting with Bob tomorrow. I plan to talk about next steps in the COM and how to handle the resolution. I will let you know how that goes. I understand that they (but I don't know who the they is) want Bob to take care of this before Tim comes takes over. I think that is good. But I think Bob should seek advice from you as to how to expedite this.

Third, I would love to find a time to talk with you in more detail about the possibility of raising funds to endow the Deanship of ACES in Bob's name. We only had a little time to touch briefly on this. While I would love to do this by meeting with you, I think we would like to get an idea of how feasible you think this is, whether you would like to invest in this, who else we should approach so that we can hopefully announce something by July 1 when he transitions out. I will ask Phyllis to check on your calendar and mine to see whether we can find a time to meet in the next 2-3 weeks and if not, whether we can touch base by phone.

Finally, I hope you have a wonderful Thanksgiving with all of your family. Thanksgiving is always a lot of work, but hopefully so much fun that the work is worth it. We have a lot to be grateful for. I am so eager to have the opportunity to work with you! Please give my best wishes to Judy.

Best,
Phyllis

From: Phyllis Wise [REDACTED]
Sent: Friday, February 20, 2015 4:18 PM
To: Phyllis Wise
Subject: Fw: One more point about Jim Roth discussion
Attachments: Draft college time line 2015-02-17.pdf

----- Forwarded Message -----

From: Normand Paquin <[REDACTED]>
To: Phyllis Wise <[REDACTED]>
Sent: Friday, February 20, 2015 3:02 PM
Subject: One more point about Jim Roth discussion

Phyllis,

I forgot one point about Jim Roth discussion. He questioned whether we had properly accounted for accreditation cost (we are fine there) but also time needed for the accreditation process (i.e. what would be impact of slipping a year to finances?). I skirted the issue BUT these is an important matter here: the time line we have been discussing among project leads suggests we are tight with respect to even making 2018 (see attached). We cannot delay the process for six months without risking falling to 2019 time line. At some point, we need to decide whether to bring this up.

Normand

Timeline will be part of discussion on Feb 27.

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED]

From: Joyce Tolliver
Sent: Saturday, February 21, 2015 12:01 PM
To: Roy Campbell
Subject: can you look at this draft?
Attachments: USC advice on CoM_feb21.docx

and of course add or change anything you'd like

I think it would be good if we could send this to Connie and Don over the weekend.

--
Joyce Tolliver

From: [REDACTED] Peterson
Sent: Monday, February 23, 2015 7:57 AM
To: Dan Peterson
Subject: Fwd: CR: [REDACTED]

Sent from my iPhone

Begin forwarded message:

From: Phyllis Wise <[REDACTED]>
Date: February 23, 2015 at 7:55:24 AM CST
To: [REDACTED] and Dan Peterso <[REDACTED]>, LRC
<[REDACTED]>; Tracy Molly <[REDACTED]>
Subject: CR: [REDACTED]
Reply-To: Phyllis Wise <[REDACTED]>

I had lunch with [REDACTED] on January 28 at Silver Creek restaurant after the COM reception at the [REDACTED] which was held on January 24th. At the reception [REDACTED] had commented that the way we could really raise funds of the COM was to get investors to give money and expect financial returns on their investments. Andreas commented that he really liked this idea and that the Governor of NC had promoted something similar. I asked [REDACTED] to meet with me so that I could find out more about what he was thinking. He told me he really did not know and that all he meant was that if investing in the COM could mean that when there was a profit, it would be shared with the investors, that we would be able to attract a great deal more money. I explained that there really were not "profits" in this situation, that any funds raised by faculty grants, contracts, IP were shared with the faculty, college, and administration to further grow the enterprise. I explained our desire for members of the community to invest because as the community thrived, so would their businesses. I mentioned examples, though I did not directly mention him. He understood what I meant and said that many of the businessmen in town carried a great deal of debt and did not have ready cash. I talked about the power of the community leaders in Greenville and how much their investment meant in the success of establishing this new COM.

I am not sure whether there is direct follow-up. I am told that [REDACTED] has considerable capacity and has not been generous. My sense from this conversation is that any further conversation has to be about an estate gift. His wife is [REDACTED]

Phyllis

From: Phyllis Wise
Sent: Monday, February 23, 2015 8:16 AM
To: [REDACTED] and Dan Peterso; Tracy Molly; LRC; Phyllis Wise
Subject: CR: [REDACTED]

I met with [REDACTED] at the University Club for breakfast on 2/17. Peter Fox suggested that I meet with [REDACTED] is a former member of the BOT [REDACTED] his contribution to the BOT and feels [REDACTED]

[REDACTED] We talked about our plans for the COM and [REDACTED] was enthusiastic. [REDACTED] agreed that it was something that they could not do in Chicago. [REDACTED] asked me what [REDACTED] could do for me and I told [REDACTED] that [REDACTED] could spread the word and that if anyone gave [REDACTED] inaccurate information, it would be great if [REDACTED] corrected it.

[REDACTED] is well connected with the [REDACTED] community and I told [REDACTED] that if [REDACTED] could introduce me to any of the leaders in that community with ties to Illinois, it would be great. But I did not get the impression that [REDACTED] thought [REDACTED] was really connected or that [REDACTED] was willing to help.

Follow-up: I will send [REDACTED] the Tripp-Umbach report. I will let Peter know that I have met with [REDACTED]

Phyllis

To: Joycet Tolliver
From: Burbules, Nicholas C
Cc: Burbules, Nicholas C
Subject: FW: University Senates Conference - February 24 and 25, Chicago
Sent: Tue Feb 24 09:18:42 2015
Importance: Normal

From: <Sailor>, Connie Sailor <csailor@uillinois.edu<mailto:csailor@uillinois.edu>>
Date: Tuesday, February 24, 2015 at 9:16 AM

To: Burbules <burbules@illinois.edu<mailto:burbules@illinois.edu>>
Subject: RE: University Senates Conference - February 24 and 25, Chicago

Nick,

Don has asked that the USC EC approve it before it goes to USC. As soon as I hear back from the committee members, I'll send it out.

Connie

From: Burbules, Nicholas C
Sent: Tuesday, February 24, 2015 6:54 AM
To: Sailor, Connie; USC Members; Vincent, Catherine (UIC)
Cc: Burbules, Nicholas C
Subject: Re: University Senates Conference - February 24 and 25, Chicago

Thanks Connie

Isn't there supposed to be a proposed draft statement from the Exec Comm for us to look at?

Nick

From: <Sailor>, Connie Sailor <csailor@uillinois.edu<mailto:csailor@uillinois.edu>>
Date: Monday, February 23, 2015 at 3:35 PM
To: USC Members <uscmembers@uillinois.edu<mailto:uscmembers@uillinois.edu>>, "Vincent, Catherine (UIC)" <vincentc@uic.edu<mailto:vincentc@uic.edu>>
Subject: FW: University Senates Conference - February 24 and 25, Chicago

Dear USC Members:

Please see the revised agenda, which is attached. There is a new item regarding the UIUC Senate's proposal for a College of Medicine. Link to Senate item is below:

<http://www.senate.illinois.edu/ep/Props/1415/FINAL/ep1533.final.pdf>

Whenever a new college is proposed, the Statutes state:

c. Colleges and Independently Organized Campus Units. A college or other independently organized campus unit, such as a school, institute, center, or similar campus unit not within a school or college, may be proposed by the appropriate senate or chancellor/vice president. The president shall submit the proposal for the unit together with the advice of the appropriate senate, taken and recorded by a vote of the senate, of the appropriate chancellor/vice president, and of the University Senates Conference to the Board of Trustees for action.

The President has officially asked for advice from USC.

Best,
Connie

From: Sailor, Connie
Sent: Thursday, February 19, 2015 5:22 PM
To: USC Members; Vincent, Catherine (UIC)
Subject: University Senates Conference - February 24 and 25, Chicago

Dear USC Members:

Please see information below about the dinner for Mr. Kennedy.

Attached is the electronic agenda packet for the meeting on February 25 in Chicago. Paper copies are being mailed. The Statutes document is not in the pdf but attached separately as a Word document. New revisions are in purple. There will be a paper copy in your packet.

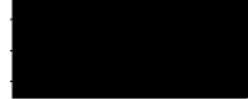
The meeting will begin at 9am in Room 213 Student Center West. USC Committees will meet at that time. Breakfast will be available at 8:30am (oatmeal, muffins, fruit and yogurt). President Easter and Vice President Pierre are not available to attend. Trustee Estrada (he has requested that there be no questions about issues that are in litigation) will arrive at 10am and Interim Chancellor Gislason at 11am. Lunch at noon followed by the business meeting.

Please let me know if you need parking near Student Center West.

Call-in information is below.

Join online meeting<<https://meet.uillinois.edu/csailor/M1ZJGYZ2>>
<<https://meet.uillinois.edu/csailor/M1ZJGYZ2>>

Join by Phone



Find a local number<<https://dialin.uillinois.edu>>

Conference ID: [REDACTED]

Forgot your dial-in PIN?<<https://dialin.uillinois.edu>> | First online meeting?<<http://r.office.microsoft.com/r/rlidOC10?clid=1033&p1=4&p2=1041&pc=oc&ver=4&subver=0&bld=7185&bldver=0>>

The dinner for Mr. Kennedy will be Tuesday, February 24, at Francesca's on Taylor, 1400 W. Taylor Street. The event will begin at 6pm for a social gathering and dinner at 6:30pm. Mrs. Kennedy [REDACTED] may attend. Please feel free to reiterate your dietary restrictions with me, but I think everything is covered. Valet parking will be available.

Below are room reservations at the Marriott Medical District, 625 S. Ashland. Please let me know if you have not been assigned a room but you need one. Please let me know if you have been assigned a room but you do not need one.

Travel information for UIUC members will be sent soon.

I can be reached the day of the meeting on my cell phone at (217) 493-0400.

Best,
Connie

KARL

MCDERMOTT

Feb-24-2015

Feb-25-2015

91518407

JORGE

VILLEGRAS

Feb-24-2015

Feb-25-2015

89860121

JOYCE

TOLLIVER

Feb-24-2015

Feb-25-2015

89860120

CONNIE

SAILOR

Feb-24-2015

Feb-25-2015

89860117

GAY

MILLER

Feb-24-2015

Feb-25-2015

89860116

XIAOQING

LI

Feb-24-2015

Feb-25-2015

89860115

PRASANTA

KALITA

Feb-24-2015

Feb-25-2015

89860114

KIM

GRABER

Feb-24-2015

Feb-25-2015

89860113

GEORGE

FRANCIS

Feb-24-2015

Feb-25-2015

89860112

ROY

CAMPBELL

Feb-24-2015

Feb-25-2015

89860110

NICHOLAS

BURBULES

Feb-24-2015

Feb-25-2015

89860105

Connie Sailor
University Senates Conference
377 Henry Administration Building, MC-348
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Phone: (217) 333-5227
Fax: (217) 244-4770
e-mail: csailor@uillinois.edu<<mailto:csailor@uillinois.edu>>

From: Ilesanmi Adesida [REDACTED]
Sent: Wednesday, February 25, 2015 5:24 PM
To: Normand Paquin
Cc: Phyllis Wise
Subject: Re: Discussion today went well

Great! Onwards. Thanks, Normand.
Ade

On Thursday, February 26, 2015, Normand Paquin <[REDACTED]> wrote:
Phyllis, Ade,

Gay Miller has just informed me that the USC has classified this as falling under category 1. This is great! See below. I have not seen final version but advice to the president will be even better than the draft I had seen.

USC "classifies" actions of the senates. From the USC Org and Functions:

Items of policy affecting one campus only are transmitted to the Board of Trustees [*Statutes, Article II, Section 1b*]. These items are classified "I" in USC minutes.

Onwards! Jennifer Woodard had a discussion with Eric Gislason. Her sense of the nature of the discussion is that this was a done deal.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

From: Normand Paquin [REDACTED]
Sent: Wednesday, February 25, 2015 5:04 PM
To: Phyllis Wise
Cc: Adesida, Ilesanmi
Subject: Re: Discussion today went well

Based on emails I was exchanging with Gay as the discussion went on, the conversations were lively to say the least at times. It appears the result was even better than I had expected.

There are likely some bruises out there.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Wed, Feb 25, 2015 at 4:51 PM, Phyllis Wise <[REDACTED]> wrote:
Fantastic. Joyce texted me that it went well. Roy sent something less clear.

Sent from my iPhone

On Feb 25, 2015, at 1:10 PM, Normand Paquin <[REDACTED]> wrote:

Phyllis, Ade,

Gay Miller has just informed me that the USC has classified this as falling under category 1. This is great! See below. I have not seen final version but advice to the president will be even better than the draft I had seen.

USC "classifies" actions of the senates. From the USC Org and Functions:

Items of policy affecting one campus only are transmitted to the Board of Trustees [*Statutes, Article II, Section 1b*]. These items are classified "I" in USC minutes.

Onwards! Jennifer Woodard had a discussion with Eric Gislason. Her sense of the nature of the discussion is that this was a done deal.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED] [age.png](#)><[image.png](#)>

From: Peter B. Fox <peterf@fox-companies.com>
Sent: Sunday, March 01, 2015 11:05 AM
To: Phyllis Wise
Subject: RE: Wise won't ask LAS to reconsider Salaita job | News-Gazette.com

Perhaps legislative affairs can ask gov ofc to speak to both re com or ed can?
Normally the appointees would be vetted by gov ofc
I would also have someone explain to loren importance of com and see if he comprehends
I suspect he would listen to greg lykins
Jas jim roth delivered his report

From: Phyllis Wise [mailto: [REDACTED]]
Sent: Sunday, March 01, 2015 10:50 AM
To: Peter B. Fox
Subject: Re: Wise won't ask LAS to reconsider Salaita job | News-Gazette.com

Peter,

I hope you are right about the new trustees. Unfortunately Jill will not be at the March meeting to vote on the COM. Ramone will, but I don't know whether he will follow Ed on the recommendation to establish a separate COM when he is Chicago-centric.

At all other universities where I have been, the Alumni Association president reports to the head of advancement (not to his own board). Assuming there should be separate AAs for each campus (alums identify with their campus, not the system), the the president of the AA should report to Dan. That way alums understand that we care about them as alums and friends, and that this should lead to giving back. In other words, alumni events are used to have a good time and to inform alums about the need to invest in the campus, on a regular basis. Hopefully that kind of engagement will lead one day to a significant gift.

I am not sure where I feel the Foundation fits into all of this. Again Foundation members identify with their campus, not the system. So if we have a University-wide UIF, then it should be doing financial management, record and database keeping. The philanthropy part should be that they are expected to be big donors, not necessarily the ones doing the development functions (i.e. asking others to give). If anything they should funnel any of their knowledge to the campus advancement folks.

I am sure this is more than you want to know about my opinion. And I am not sure I want you to share this with anyone else since our alumni association and our foundation have a different understanding of their functions that the ones have just described and it is not really my job to reconfigure this.

We have had about 10 inches of snow overnight and it is really beautiful!

Phyllis

From: Peter B. Fox <peterf@fox-companies.com>
To: Phyllis Wise <[REDACTED]>
Sent: Sunday, March 1, 2015 9:44 AM
Subject: RE: Wise won't ask LAS to reconsider Salaita job | News-Gazette.com

I know jill a little bit
My sense is the new trustees will follow eds lead
The path via alumni assoc is nice but that association is not impressive
I wish alumni and foundation were combined with a great leader

-----Original Message-----

From: Phyllis Wise [mailto:
Sent: Saturday, February 28, 2015 3:16 PM
To: Peter B. Fox
Subject: Re: Wise won't ask LAS to reconsider Salaita job | News-Gazette.com

We have to get past this so we can concentrate on the critically important things for public research intensive universities. Otherwise Illinois will fall behind.

Hope you are well!
Phyllis

PS do you know either of the new trustees?

Sent from my iPhone

> On Feb 28, 2015, at 3:06 PM, Peter B. Fox <peterf@fox-companies.com> wrote:

>
> I'm glad you are firm
> It's nice after many!! Years to have a campus leader
> <http://www.news-gazette.com/news/local/2015-02-28/wise-wont-ask-las-re-consider-salaita-job.html>
>
>
> Sent from my iPhone
> Peter B. Fox
> 1909 Fox Drive
> Champaign, IL 61820
> O: 217-351-1430 ext. 15 | C: peterf@fox-companies.com
> www.fox-companies.com

From: Phyllis Wise
Sent: Sunday, March 01, 2015 6:24 PM
To: [REDACTED] and Dan Peterso; Tracy Molly; LRC; Phyllis Wise
Subject: CR: [REDACTED]

I had lunch with [REDACTED] on February 18th at the Four Seasons Hotel. Avijit Ghosh had suggested that I meet him since he had distanced himself from the College of Business after less than ideal interactions with Tina. Before the meeting, the email exchanges between her and [REDACTED] were shared with me. I can understand his displeasure.

He started out by asking me what I could do for him. I told him that I had heard a great deal about him from Avijit and he spoke so highly of him that I had wanted to meet him. He told me about starting his business - all of that is already known.

I thanked him for all his support for the College of Business and for I-Promise. I told him about the search for the new dean and the excellent search committee that Ade had put together. He showed no interest and asked no questions. I told him about I-Promise and he asked a couple of questions. I did not know the answers and so followed up with Susan Gershenfeld and responded to him.

He told me that he had heard about the COM - I suspect that Avijit might have told him. I described what we were doing, the program, the financial model and he said it was a fantastic idea. He asked questions about when it would get started, wanted to know more about Carle.

Follow-up: I should stay in contact with him somehow. Next steps might be a thought leader dinner or a COM reception/dinner.

From: Ilesanmi Adesida [REDACTED]
Sent: Monday, March 02, 2015 6:09 AM
To: Phyllis Wise
Cc: Normand Paquin
Subject: Re: Detail about March 3rd meals with Dr [REDACTED]

Thanks for taking the tab. Let the wine flow! I am ready.

On Sun, Mar 1, 2015 at 9:05 PM, Phyllis Wise <[REDACTED]m> wrote:
I will take the tab.

From: Normand Paquin <[REDACTED]>
To: Phyllis Wise <[REDACTED]>; "Adesida, Ilesanmi" <[REDACTED]>
Sent: Sunday, March 1, 2015 3:36 PM
Subject: Detail about March 3rd meals with Dr [REDACTED]

Phyllis, Ade,

Can I suggest we make sure one of you (or someone on your behalf) pick up the tab for lunch at Timpone's and thus position Carle to pick up the tab at Bacaro's for dinner? It is more likely that we will stay on the per person university limit at lunch.

It's a detail but may keep things simpler.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

From: Normand Paquin [REDACTED]
Sent: Monday, March 02, 2015 11:21 AM
To: Ilesanmi Adesida
Cc: Phyllis Wise
Subject: Re: FW: The University of California, Riverside (UCR), School of Medicine Background

I believe this is correct. Something that can be clarified. There was a \$58 million building involved.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

On Mon, Mar 2, 2015 at 6:08 AM, Ilesanmi Adesida <[REDACTED]> wrote:
Thanks, Normand. They secured \$100M in gifts.donation for a ten-year period making it \$10M annually. So on top of this, they got another \$15M from the State?

On Sun, Mar 1, 2015 at 2:53 PM, Normand Paquin <[REDACTED]> wrote:
Phyllis, Ade,

If you have a chance, these notes on UC-Riverside may be most helpful ahead of [REDACTED] visit.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]

----- Forwarded message -----

From: **Frerichs, Laura Appenzeller** <lfrerich@illinois.edu>
Date: Fri, Feb 27, 2015 at 11:38 AM
Subject: FW: The University of California, Riverside (UCR), School of Medicine Background
To: "Stephanie.Beever (Stephanie.Beever@carle.com)" <Stephanie.Beever@carle.com>, Normand Paquin [REDACTED], "Felix, Jonathan (US - Denver)" <jofelix@deloitte.com>, "Patricia.Adams" <Patricia.Adams@carle.com>, "Joseph.barkmeier@carle.com" <Joseph.barkmeier@carle.com>

I am resending these notes I previously put together about UC Riverside's COM, thought these details might also be helpful prior to our meetings on 3/3 with [REDACTED]

From: Frerichs, Laura Appenzeller
Sent: Monday, August 25, 2014 11:13 AM
To: Stephanie.Beever (Stephanie.Beever@carle.com); Normand Paquin; DeLorenzo, Michael T; Paul Umbach (PUMBACH@trippumbach.com); Beth Paul (BPAUL@trippumbach.com); Patricia.Adams; O'quinn, Ryan (US - Atlanta)
Subject: The University of California, Riverside (UCR), School of Medicine Background

There are many interesting parallels that make this COM good for us to consider, given their relationship with UCLA and the other existing COMs in the UC System.

About The University of California, Riverside (UCR), School of Medicine

The University of California, Riverside (UCR), School of Medicine is one of six University of California medical schools in the state of California, associated with UC Riverside. It enrolled its first class in 2013. See the video from the grand opening about why they pursued despite skeptics: <http://youtu.be/j9oZgRIaeUo>

The UCR School of Medicine is built on the foundation of the existing UCR/UCLA Thomas Haider Program in Biomedical Sciences, which has been in place since 1974. **The program offers the first two years of medical school instruction at UCR to 25 students annually, after which students transfer to the David Geffen School of Medicine at UCLA to complete the clinical clerkships for their M.D. degrees which are awarded by UCLA.** Through this program over 700 students have begun their medical education at UC Riverside and completed their medical degrees at UCLA. **That exchange will be phased out over the next two years, COM Dean Richard Olds said.** Within the newly established UC Riverside School of Medicine, the Thomas Haider Program will continue with its charter to attract and support students from underrepresented populations, in particular those who have attended UCR for at least 6 consecutive quarters before completing their bachelor's degree there.

The University of California Board of Regents approved establishment of the UCR School of Medicine in 2008, and it enrolled its first incoming class of 50 medical students in fall 2013. The school is the only one in the UC system without its own hospital, an arrangement that vastly reduces costs through partnerships with local hospitals and clinics.

In 2010 G. Richard Olds, M.D., former chair of medicine at the Medical College of Wisconsin, was appointed vice chancellor of health affairs and founding dean. Olds secured **commitments of \$100 million over 10 years by 2012 after the LCME accreditation rejection.** The donors included the UC system, Riverside County, the quasi-governmental Desert Healthcare District and affiliated hospitals.

In 2011 LCME denied preliminary accreditation to the UCR School of Medicine, based primarily on the LCME's assessment that the school had not demonstrated sufficient financial resources to sustain a sound program of medical education. In addition, the LCME found inadequate strategic planning, insufficient key personnel, and weak policies and procedures related to student advancement and diversity. The LCME also found limited clinical education opportunities in psychiatry and pediatrics. In October 2012 the LCME granted preliminary accreditation to UCR, thus allowing the school to start recruit an **inaugural class of 50 students**, who entered in August 2013. This is the first time in three decades that an American medical school was approved after previously having been denied.

The medical school also **operates a Ph.D. program in biomedical sciences**, a long-standing graduate degree program at UCR. Additionally, the medical school will develop a range of residency training programs, the post-M.D. education required for doctors to become board certified in their specialties.

State Funding

The State of CA reached a budget compromise in June 2013 that gives UC Riverside's School of Medicine **full and continuous funding of \$15 million per year** — long-sought assistance that enables the school to flourish and greatly facilitates its ongoing accreditation. The budget provides for an increase in the University of California base budget of \$125.1 million for the new fiscal year, along with approval for UC to restructure its bond debt, generating an estimated \$80 million annually for the next decade. Funding for the UCR medical school will now be part of UC's base budget annually going forward.

Faculty

The Dean planned to have 15 to 20 medical scientists and about 25 medical doctors to create a bare-bones staff to start the College of Medicine. He plans to have an initial non-teaching staff of 20 to 30 people to handle the anticipated 2013 class of 50 students. Eventually, once the state is in a position to provide ongoing funding, he sees the schools staff increasing to about 1,000 people (including clinical faculty).

Facilities

UC Riverside recently built a medical research lab building, and underwent a large renovation for medical school classrooms and practice clinics, projects that cost about \$58 million in UC, state, federal and other funds.

School of Medicine Education Building

Part of the start-up phase to establish permanent facilities for the UCR School of Medicine, the building housing the UCR/UCLA Thomas Haider Program in Biomedical Sciences has been renovated and transformed into the

new School of Medicine Education Building. The project was recently completed and will accommodate the first class of medical students by providing educational and administrative space. [Sounds like the UCLA students are collocated with the UCR students] Full-scale construction remodeled the building, incorporating modern design that is technologically innovative. Square footage was expanded, creating room for small-group problem-based learning sessions and Objective Structured Clinical Examinations (OSCEs). Additional room was added to the entry and for student study and lounge space.

New features included:

- **Medical Simulation Laboratory**
- A 100-seat lecture hall
- 10 patient examination rooms
- Small-group discussion rooms

The project entailed:

- Complete renovations of the basement and second floor
- Partial renovation of the first floor
- Seismic upgrades
- Interior renovations
- Landscape renovations

The School of Medicine Research Building

The Research building is three-stories and totals approximately 58,000 gross square feet. By providing academic offices, research laboratory and support space, it accommodates both biomedical sciences and clinical sciences faculty. The Building creates working environments that support and foster scientific synergy between faculty researchers, postdoctoral fellows, graduate students and support staff. This building is a certified LEED Gold facility. Webber Hall contains the laboratories of faculty in the School of Medicine Division of Biomedical Sciences.

Research support space includes:

- Fluorescence-activated cell sorting room
- Cell culture rooms
- Controlled temperature rooms
- Imaging rooms

- Autoclave room
- Bioinformatics space
- Biosafety Level 3 Laboratory, the only such facility on the UCR campus

Academic offices and support space includes:

- Faculty offices
- Postdoctoral and graduate student space
- Office support areas
- Conference rooms/scholarly activity areas

Herbert John Webber Hall – Repurposing old space for research labs for the medical school

Originally constructed in the 1950s, with a number of laboratories since renovated, the building also contains faculty laboratories in the department of Plant Pathology and Microbiology.

Changing Education and Traditional Hospital Model

“The way doctors will be trained is a 180-degree shift from the current medical school model,” said Dean Olds.

Among those differences:

1. A focus on producing more primary care physicians rather than specialists who would establish practices in the region.
2. Emphasizing illness prevention instead of focusing on treating people who are already sick by working in cooperation with local health agencies.
3. Using outpatient and community clinics for much of training instead of nearly exclusive use of a large hospital setting.
4. Drawing support and funding from local government, healthcare networks and private entities, instead of relying mostly on monies from the state level.

Medical school faculty members are organized in two divisions — the Division of Biomedical Sciences and the Division of Clinical Sciences. There are 21 faculty members in the Division of Biomedical Sciences. There is language in their Division of Biomedical Sciences faculty position requirements that states “Applicants must hold a Ph.D., M.D., or equivalent degree and qualify for a tenured faculty appointment at the University of California.” Faculty in the Division of Clinical Sciences teach in all four years of the M.D. curriculum, with particular emphasis upon clinical skills training and clerkship rotations. In addition to these faculty members, the UCR School of Medicine benefits from the teaching skills of approximately 200 community physicians who comprise the volunteer clinical teaching faculty.

Dean Recruitment

Dr. Phyllis Guze was named executive director of medical school planning in September 2007 and, in December 2008, was named acting vice chancellor for medical sciences and dean. Dr. Guze, charged by Chancellor Timothy White, initiated a national search for a founding dean for the medical school. In late 2009, Dr. G. Richard Olds, M.D., an internationally recognized tropical disease authority and former chair of the Department of Medicine at the Medical College of Wisconsin, was appointed as the founding dean. He began his tenure on February 1, 2010, whereupon Dr. Guze was made associate vice chancellor, health affairs and senior executive dean.

Philanthropy

Gift types:

- Undesignated gifts to the School of Medicine are used by the Dean and leadership to provide flexibility in supporting our important work of teaching the next generation of physicians and healthcare professionals.
- The School of Medicine Annual Fund: Gifts to the Annual Fund from alumni, parents, and friends can support specific areas of interest or they can be unrestricted to provide flexibility to support areas of greatest needs.
- Medical School Scholarship Fund: This scholarship fund will help prepare medical students and graduate students for distinguished careers in clinical practice, teaching, research, and public service.
- Faculty Support: Private gifts designated for faculty support help us attract and retain world-class faculty in the biomedical sciences and clinical sciences.
- Facilities & Equipment

Laura A. Frerichs

Director, University of Illinois Research Park

Director of Economic Development, UIUC Public Engagement

217-333-8323

lfrerich@illinois.edu

#laurafrerichs, #uiresearchpark

www.researchpark.illinois.edu

To: Joycet Tolliver
From: Burbules, Nicholas C
Cc: Burbules, Nicholas C
Subject: FW: ASAC meeting on 3-11-15
Sent: Mon Mar 02 12:21:08 2015
Importance: Normal

Somewhere chai latte's are sputtering across the computer screens

"support the team"?

(Some at UIC, and some here on this campus)

From: <Campbell>, R H <rhc@illinois.edu<mailto:rhc@illinois.edu>>
Date: Monday, March 2, 2015 at 12:13 PM

Dear SEC:

Please note that ASAC will be meeting on the 11th in the Illini rooms at 3pm and it will include President Easter's recommendation regarding the COM, see below.
You might want to come, listen and support the team.

Roy

From: Kies, Susan Mary
Sent: Friday, February 27, 2015 2:27 PM
To: McMillan, Edward (UIF Contact); Hasara, Karen; Montgomery, James D.; Estrada, Ricardo ; Cave, Hannah P (UIS); Frye, Lucas; Judge Holmes; Leibowitz, Danielle; Koritz, Timothy N; Easter, Robert A; Killeen, Timothy L
Cc: Wise, Phyllis M; Gislason, Eric A (UIC); Koch, Susan J; Bauman, Jerry L (UIC); Bearrows, Thomas; Hardy, Thomas P; Knorr, Walter; Creasey, Jennifer M; Pierre, Christophe; Schook, Lawrence B; Fitzgerald, Patrick; Rc110@ntrs.com<mailto:Rc110@ntrs.com>; McKeever, Lester H.
Subject: ASAC meeting on 3-11-15

To: Members of the Board of Trustees, President Easter, and President-designate Killeen

This is a reminder that the Academic Student and Educational Affairs Committee (ASAC) meeting will be held on 3-11-15 at 3pm at the Urbana Campus in the Illini Union, Illini Rooms B & C.

US Congressman Rodney Davis is planning to stop by BEFORE the meeting at 2:45 pm for a quick 'meet and greet'. We hope you will be able to be present at that time.

Also, this is a reminder that all trustees have been invited to attend the meeting to hear and discuss President Easter's recommendation regarding the Urbana College of Medicine proposal.

Susan

Susan M Kies, EdD
Secretary of the Board of Trustees and of the University
352 Henry Administration Building, MC-350
506 South Wright Street
Urbana, IL 61801
O: (217) 333-1920
H: (217) 384-6695

C: (217) 898-7949
kies@uillinois.edu<mailto:kies@uillinois.edu>

=====

Roy Campbell
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Siebel Center
201 N Goodwin Av, Urbana, IL 61801-2302
Tel 217-333-0215 Email rhc@illinois.edu<mailto:rhc@illinois.edu>

Appointments etc:
Hobby, Kimberly S <khobb2@illinois.edu<mailto:khobb2@illinois.edu>>
Phone (217) 300-2508

From: Normand Paquin [REDACTED]
Sent: Monday, March 02, 2015 3:53 PM
To: Phyllis Wise
Cc: Adesida, Ilesanmi
Subject: Reassuring

Avijit meeting was reassuring.

He expects any UIC-UIUC issues to remain firmly within President's office and be dealt with rapidly. He would expect framework settled by mid May. Doesn't envisage opportunity for UIC to slow down the process.

If you have any concerns, please feel free to talk to him.

Budget issues were not significant - LCME accreditation cost, start-up packages. I emphasized room for changes and financial risk scenario analysis. He seemed to suggest Bob was overall satisfied with budget.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel [REDACTED] 

From: Phyllis Wise [REDACTED]
Sent: Tuesday, March 03, 2015 9:56 AM
To: Ilesanmi Adesida; Normand Paquin
Subject: Re: A bit more detail about my meeting today

I had heard that UIC was going to object to the name "Illinois" not the Carle part. Carle has given \$100M+. I think they deserve to have their name somewhere in the COM. If someone else steps up with more than Carle, they have said it would be the XXX College of Medicine at Carle and Illinois or something like that. I'd love to have this problem!

From: Ilesanmi Adesida [REDACTED]
To: Normand Paquin <[REDACTED]>
Cc: Phyllis Wise <[REDACTED]>
Sent: Tuesday, March 3, 2015 5:05 AM
Subject: Re: A bit more detail about my meeting today

Thanks, Normand. Looks like an in depth discussion. My understanding is that Carle is not hung up on the name. The name could be changed if we found somebody else to endow the name. My hope is that having the name Carle will not frighten folks who may have the aspiration to endow another name.

Ade

On Monday, March 2, 2015, Normand Paquin <[REDACTED]> wrote:

Phyllis, Ade,

I have a bit more time as industry workshop moves to poster session:

Some additional points discussed with Avijit:

Discussed accreditation costs which Bob seemed hung up on: explained this was easily accommodated; estimate of costs provided by UC-Riverside planning dean; reference additional materials sent to Jim Roth.

Discussed start-up packages. Explained all these are covered. Referenced additional materials

Discussed facilities - told him we had quality space identified.

Discussed naming of the college. Said I had heard Bob was potentially not on board with name. Avijit said he would inquire. He didn't seem to think name was out of line.

Really emphasized budget room for adjustments, financial shocks. Discussed risk analysis. Asked him if he thought any other college could survive stress test we looked at.

He asked me what we were doing with biologists and allaying their fears. Explained major effort ahead of senate vote. Talked about possibility of UIC NOT wanting to move forward - I talked about commitment to absorb faculty. Highlighted the fact that FTE was small and that it would have to happen over time since UIC could not simply walk away from LCME and their commitments to the students.

It was clear he had not read what I had sent to him, Mike Devocelle and Jim Roth. I resent the material and I am hopeful he will look.

Spoke of importance of a green light for fundraising. He understood that.

Spoke of importance to give Dean Azar cover and not setting up a situation where UIC could delay things. He said he didn't think we had to worry.

Asked me about next steps if approval comes. I spoke about three elements: Definitive Agreements by mid May, Dean search, LCME documentation. Highlighted how we were already moving where we could to accelerate all those elements.

Not sure he sees himself in his current role for nay length of time although he said he was enjoying it. Intricacies have surprised him and he suspect their is much for him to learn.

Knows Ed very well and new BOT (Jill, I think) is someone that was on his advisory board for many years. Does not know the other.

He did say that naming the college after Carle will require another BOT resolution at some point. He said that normally, the naming of a college should be for an endowment corresponding to roughly 10% of the college budget. He realizes money is not towards endowment but we discussed that \$100+ investment did correspond to \$4 million/yr endowment and thus could be viewed as somewhat equivalent. I also emphasized that that \$50 million got Dell the name on UT-Austin COM and that this size of contribution was entirely consistent with naming.

I think those were the main points. As noted earlier, he didn't think we needed to be worried about delays although they were still fine tuning the resolution.

Normand

Dr. Normand Paquin
Skype: normand_paquin
Tel: +1-217-819-8964

From: Normand Paquin [REDACTED]
Sent: Thursday, March 05, 2015 9:39 PM
To: Phyllis Wise
Subject: Re: Last minute wrinkles

I am fine with that.

Normand

On Mar 5, 2015 9:14 PM, "Phyllis Wise" [REDACTED] > wrote:
Normand,

If I read this exchange correctly, I don't think that this is worth holding up the signing of the MOU. As you and Steph point out, all of this can be ironed out in the definitive agreement.

Phyllis

From: Normand Paquin <[REDACTED]>
To: Phyllis Wise [REDACTED]
Sent: Thursday, March 5, 2015 6:02 PM
Subject: Last minute wrinkles

Phyllis,

Below is the initial response to the revised MOU from Steph and my reply. As you ready this, please keep in mind that the draft MOU starts with,

[REDACTED]

If we want an MOU to be signed soon after March 12th (which I think is a good idea), we ought to drop the suggested additions that are giving them concerns. We will need to be ready to explain to the USSP that they are redundant in that 1) the above paragraph applies to College matters (even as the Joint Liaison Committee stands separate from it), 2) the University must operate within the University Statutes in any case, and 3) we can go into more detail in the Definitive Agreements. Would that be agreeable to you? We can discuss tomorrow. You do have a copy of the latest draft MOU since I copied you on my email to Lisa Power sent on Wed at 10:45 AM.

I'll note quickly that I thought the first and third points raised by Steph had already been cleared as OK with Steph when I had walked her through suggested changes a few weeks ago. I suspect on second reading, she became less comfortable.

Normand

Steph, Kurt, and Patty,

Catching up after a hectic day of meetings.

The changes are not meant to be material but were inserted more to reassure the USSP about our intent to comply with the University Statutes.

With respect to the first point, we could simplify and change simply to read,

With respect to the other two points, these insertions were made to reassure the USSP Committee that we would proceed in a manner consistent with the University Statutes, especially with regards to shared governance matters. It is not clear that these additions would have any impact in reality. For example, I would concur with Steph that matters she and I think to be addressed by the Joint Liaison Committee would be unlikely to involve shared governance mechanisms. I think this is about trying to be ultra-careful by the USSP.

We'll certainly give some thought to whether we can simply drop some of these proposed changes.

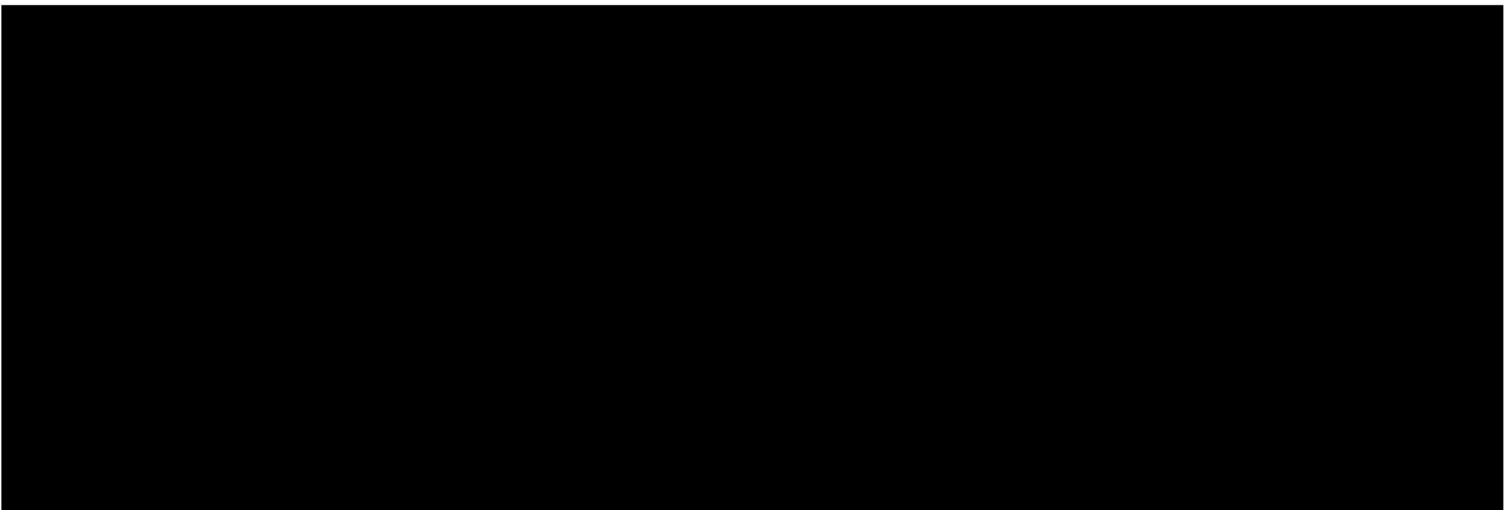
Normand

--

Kurt and Patty,

I received the attached revisions to the College of Medicine MOU from Normand. As I am out of the office, can you review the attached proposed revisions. Per our conversation yesterday, we need to be very thoughtful related to whether the changes are material and will require Carle Board for approval. I do not believe that is what Normand had intended.

As I quickly glance at this during my travels, I do have a couple areas that I would ask for your specific attention:



Normand,

The changes noted above necessitate additional conversation, which I do not expect will be able to be completed prior to the Board meeting next week. As we are in the middle of definitive agreements, I would

ask for significant consideration as to whether these items necessitate inclusion in the MOU versus giving appropriate discussion time between parties and inclusion of information in the definitive agreements.

STeph

Dr. Normand Paquin
Skype: normand_paquin
Tel: [REDACTED]
[REDACTED]

From: Normand Paquin [REDACTED]
Sent: Tuesday, March 10, 2015 10:51 PM
To: Phyllis Wise
Subject: Re: A note about the ed pol proposal

I agree on your interpretation but there is that word, "but". We will see tomorrow.

Normand

On Mar 10, 2015 10:20 PM, "Phyllis Wise" [REDACTED] wrote:

>
> Yes, but approval of the BOT of the definitive agreement, usually means Walt Knorr signs of behalf of the BOT. They have never gone over a contract line-by-line. But they might in this case...

>

>

> From: Normand Paquin [REDACTED] >

> To: Phyllis Wis [REDACTED]

> Sent: Tuesday, March 10, 2015 8:42 PM

> Subject: A note about the ed pol proposal

>

> Phyllis,

>

> Based on discussions earlier today, it is worth remembering that the proposal to ed pol and voted by the senate stated:

>

> The following additional steps must also be carried out before the admission of the charter class of students:

>

> Completion of Definitive Agreements between the University and the Carle Health System upon approval of the establishment of the College[1];

> Approval by the Board of Trustees of the Definitive Agreements, and,

> Approval by the Liaison Committee on Medical Education (LCME[2]) of the College of Medicine's submission for preliminary accreditation.

> While we might interpret the bolded segment as simply getting the agreement signed off on behalf of the BOT, this might be interpreted by others as actual review and approval.

>

> Normand

>

> [1] The Definitive Agreements will be completed in consultation with appropriate Senate committees.

> [2] The LCME is the national accrediting organization for schools and colleges of medicine.

>

>

> Dr. Normand Paquin

> Skype: normand_paquin

> Tel: [REDACTED]

>

>

From: Normand Paquin [REDACTED]
Sent: Wednesday, March 11, 2015 9:25 AM
To: Phyllis Wise
Subject: A quick note for today

Phyllis,

Based on various pieces of discussion, I would not be surprised if the notion of reviewing the Definitive Agreements for the May meeting comes up. In my mind:

- 1) Since are nominal target for completing negotiations with Carle is mid-May at the earliest, I doubt we can produce these in time for review ahead of the May 7 BOT meeting.
- 2) The more items we need to address, the less time I have for the Definitive Agreements. While we are not on the task force Bob as alluded to, I'm quite certain we and Carle are going to be pulled in, especially if it focuses on how we will work with the existing COM. With Steve Sligar on the task force, I'm quite certain times will be interesting.
- 3) As you might imagine, I regret not having made more progress on the Definitive Agreements. There has been just too many fires to put out and people to reassure. The mid-May time line looks quite difficult to me.

With that in mind, if the question comes up, please consider your response. I would suggest remaining positive but hinting that we'll want to take the time to get this right to set the foundation for a strong and vibrant partnership leading to a strong and vibrant college.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED] 

From: Normand Paquin [REDACTED]
Sent: Wednesday, March 11, 2015 12:37 PM
To: Phyllis Wise
Subject: A second quick note for today

Phyllis,

Not sure how important this is but want to make sure you have full picture:

Susan Kies contacted me on behalf of Ed McMillan to ask me whether consultants had conducted the risk analysis (as per the document shared yesterday) or whether it was done by the campus. I told her that it had been done by us.

I pretty much threw out everything the PMO (i.e. not their risk management experts) people from Deloitte put together. As such, Deloitte was not willing to certify the work (I inquired about that). Tripp Umbach provided only some data and some limited ideas but more in response to requests. We should not go into these details of course.

One thing I did not mention but we can say is that four of our College of Business faculty were involved in guiding our efforts and reviewing the work completed.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel: [REDACTED] 

From: Leanne Courson <[REDACTED]>
Sent: Wednesday, March 11, 2015 2:39 PM
To: Leanne Barnhart
Subject: Fwd: CR: [REDACTED]

Sent from my iPhone

Begin forwarded message:

From: Phyllis Wise <[REDACTED]>
Date: March 1, 2015 at 6:24:17 PM CST
To: [REDACTED] and Dan Petersen <[REDACTED]> [REDACTED] Tracy Molly
[REDACTED] i>, LRC [REDACTED]
Subject: CR: [REDACTED]
Reply-To: Phyllis Wise <[REDACTED]>

I had lunch with [REDACTED] on February 18th at the Four Seasons Hotel. Avijit Ghosh had suggested that I meet him since he had distanced himself from the College of Business after less than ideal interactions with Tina. Before the meeting, the email exchanges between her and [REDACTED] were shared with me. I can understand his displeasure.

He started out by asking me what I could do for him. I told him that I had heard a great deal about him from Avijit and he spoke so highly of him that I had wanted to meet him. He told me about starting his business - all of that is already known.

I thanked him for all his support for the College of Business and for I-Promise. I told him about the search for the new dean and the excellent search committee that Ade had put together. He showed no interest and asked no questions. I told him about I-Promise and he asked a couple of questions. I did not know the answers and so followed up with Susan Gershenfeld and responded to him.

He told me that he had heard about the COM - I suspect that Avijit might have told him. I described what we were doing, the program, the financial model and he said it was a fantastic idea. He asked questions about when it would get started, wanted to know more about Carle.

Follow-up: I should stay in contact with him somehow. Next steps might be a thought leader dinner or a COM reception/dinner.

From: Leanne Courson [REDACTED]
Sent: Wednesday, March 11, 2015 2:40 PM
To: Leanne Barnhart
Subject: Fwd: CR: [REDACTED]

Sent from my iPhone

Begin forwarded message:

From: Phyllis Wise [REDACTED]
Date: February 23, 2015 at 8:15:59 AM CST
To: [REDACTED] and Dan Peterso <[REDACTED]> Tracy Molly
<mollyt@illinois.edu>, LRC <[REDACTED]>
Subject: CR: [REDACTED]
Reply-To: Phyllis Wise [REDACTED]

I met with [REDACTED] at the University Club for breakfast on 2/17. Peter Fox suggested that I meet with [REDACTED] is a former member of the BOT [REDACTED] is extremely proud of his contribution to the BOT and feels [REDACTED]

[REDACTED] We talked about our plans for the COM and he was enthusiastic. [REDACTED] agreed that it was something that they could not do in Chicago. [REDACTED] asked me what he could do for me and I told [REDACTED] that [REDACTED] could spread the word and that if anyone gave [REDACTED] inaccurate information, it would be great if [REDACTED] corrected it.

[REDACTED] is well connected with the [REDACTED] community and I told [REDACTED] that if [REDACTED] could introduce me to any of the leaders in that community with ties to Illinois, it would be great. But I did not get the impression that [REDACTED] thought [REDACTED] was really connected or that [REDACTED] was willing to help.

Follow-up: I will send [REDACTED] the Tripp-Umbach report. I will let Peter know that I have met with [REDACTED]

Phyllis

From: Leanne Courson <[REDACTED]>
Sent: Wednesday, March 11, 2015 2:40 PM
To: Leanne Barnhart
Subject: Fwd: CR [REDACTED]

Sent from my iPhone

Begin forwarded message:

From: Phyllis Wise [REDACTED].m>
Date: February 23, 2015 at 7:55:24 AM CST
To: [REDACTED] and Dan Peterso <[REDACTED]>, LRC
<[REDACTED]> Tracy Molly <[REDACTED]>
Subject: CR: [REDACTED]
Reply-To: Phyllis Wise [REDACTED].m>

I had lunch with [REDACTED] on January 28 at Silver Creek restaurant after the COM reception at the [REDACTED] which was held on January 24th. At the reception [REDACTED] commented that the way we could really raise funds of the COM was to get investors to give money and expect financial returns on their investments. Andreas commented that he really liked this idea and that the Governor of NC had promoted something similar. I asked [REDACTED] to meet with me so that I could find out more about what he was thinking. He told me he really did not know and that all he meant was that if investing in the COM could mean that when there was a profit, it would be shared with the investors, that we would be able to attract a great deal more money. I explained that there really were not "profits" in this situation, that any funds raised by faculty grants, contracts, IP were shared with the faculty, college, and administration to further grow the enterprise. I explained our desire for members of the community to invest because as the community thrived, so would their businesses. I mentioned examples, though I did not directly mention him. He understood what I meant and said that many of the businessmen in town carried a great deal of debt and did not have ready cash. I talked about the power of the community leaders in Greenville and how much their investment meant in the success of establishing this new COM.

I am not sure whether there is direct follow-up. I am told that [REDACTED] has considerable capacity and has not been generous. My sense from this conversation is that any further conversation has to be about an estate gift. His wife is [REDACTED]

Phyllis

From: McMahon, Julie W
Sent: Wednesday, March 11, 2015 4:43 PM
To: Robin Kaler; Kacich, Libby
Subject: Re: Artwork for colleges
Attachments: COM_504x504.jpg; COM_612x612.jpg; COM_700x500.jpg; COM_851x315.jpg; COM_1500x500.jpg; COM-180x180.jpg; COM-400x400.jpg

Here's the artwork I did for Meaghan for her social media. that should do it for starters?
they can contact me for any specific sizing?

On 3/11/15 4:39 PM, "Robin Kaler" [REDACTED] wrote:

>Hi folks:
>
>What should I tell CCOs to expect tomorrow re: CoM? "Artwork for your
>website" or something else?
>
>Thanks!
>r
>
>Sent from my iPhone

PROUD TO ANNOUNCE

New College. New Medicine.

CARLE-ILLINOIS COLLEGE OF MEDICINE



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CARLE-ILLINOIS
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MEDICINE

From: McMahon, Julie W
Sent: Wednesday, March 11, 2015 4:56 PM
To: Kacich, Libby; Robin Kaler
Subject: Re: Artwork for colleges

The larger images are sized specifically for social media, but can be reduced for webpage use:

Twitter: Cover= 1500x500; profile = 400x400

Facebook: cover = 851x315; profile = 180x180; posts = 505x504

Instagram: 612x612

There two profile squares will also work well on web pages.

Any specific sizes needed? just contact Julie McMahon <<mailto:jmcmahon@illinois.edu>> and she'll get to them as quickly as possible.

On 3/11/15 4:49 PM, "Kacich, Libby" <lkacich@illinois.edu> wrote:

>"Artwork for your website" works. Specifically, we have horizontal and
>square images that can be used for social media and campus website
>slideshows, banners, etc. Julie just sent those along. She will be
>available to resize and help adjust images if needed for specific
>application.

>

>

>

>On 3/11/15 4:39 PM, "Robin Kaler" [REDACTED] > wrote:

>

>>Hi folks:

>>

>>What should I tell CCOs to expect tomorrow re: CoM? "Artwork for your
>>website" or something else?

>>

>>Thanks!

>>r

>>

>>Sent from my iPhone

>

From: James.Leonard <James.Leonard@Carle.com>
Sent: Wednesday, March 11, 2015 7:25 PM
To: Phyllis Wise
Subject: Nice job

Congratulations- you did an excellent job today! There is a lot of excited faculty tonight and you made it happen.
See you tomorrow.

Jim

Sent from my iPad

From: Chancellor Phyllis M. Wise
Sent: Thursday, March 12, 2015 12:04 PM
To: [REDACTED] Campus Webmaster
Subject: New College. New Medicine.



Dear Members of the Illinois Family:

I am delighted to share the following email with you. I sent it to our faculty, staff and students today after the U of I Board of Trustees voted to approve our request to start an engineering-based college of medicine. I hope you will visit the website at www.medicine.illinois.edu to follow our progress and join us in this transformational endeavor.

Sincerely,

Chancellor Phyllis M. Wise

New College. New Medicine.

Dear Members of the Campus Community,

I write to share the exciting news that the University of Illinois Board of Trustees voted unanimously today to establish the nation's first college of medicine focused, from the beginning, on the intersection of engineering and medicine. This will be the first new college created on our campus in 60 years.

It will be a partnership between the University of Illinois at Urbana-Champaign and Carle Health System, and it is specifically designed to train a new kind of doctor and drive technology-based innovations in health care. This groundbreaking approach will integrate the university's unparalleled assets in engineering, technology and supercomputing with Carle's nationally recognized, comprehensive health care system. While infusing engineering with medicine is a distinctive facet of the proposed college, this new school also will tremendously benefit from leveraging expertise and knowledge from across the campus.

The professionals we educate will advance health care far beyond what we can currently comprehend. Not only will their patients benefit, but the impact they make will extend to countless others who will be healthier as a result of their medical discoveries.

The College of Medicine grew from recommendations in a 2014 economic development study conducted by the Research Park. Since that time, faculty and staff members from across campus have been working with Carle physicians and staff to develop business, governance and financing plans. I want to thank all of the faculty leaders, the Academic Senate and all campus deans who have been involved in the evaluation process. In addition, many community, state and national leaders have contributed critical thoughts that have been essential to establishing this truly unique college of medicine. Your advice and criticism have made our plan stronger, more strategic and a greater opportunity for broad collaboration with every academic unit across campus, with UIC and with other collaborators.

The college will be funded through a combination of revenue from new inventions, medical student tuition, corporate investments and private philanthropy.

The next steps toward making our shared vision a reality include seeking approval by the Illinois Board of Higher Education, recruiting a founding dean, securing financial support from donors and investors, and submitting material to seek accreditation from the Liaison Committee for Medical Education. As our vision continues to mature, I look forward to continued discussions on how the new college can truly reflect the breadth of excellence that is Illinois.

If you would like to learn more about the college, please visit the following link: www.medicine.illinois.edu

Sincerely,

Phyllis M. Wise
Chancellor

UNIVERSITY OF ILLINOIS
University Administration Chicago Campus Springfield Campus



From: Nick Burbules [REDACTED]
Sent: Thursday, March 12, 2015 12:18 PM
To: Phyllis Wise
Subject: Re: Questions

Thanks Phyllis,

This was the topic of several conversations today outside of the Board meeting itself. I hope Rick and/or Mike step forward and say "this is not the relation between our campuses we want moving forward."

Ironic that they form this new committee to address how the different programs fit together and Dmitri pre-empts all that (apparently) by making this decision unilaterally.

Personally I think it hurts them more than it hurts us. But it hurts the cross-campus climate even more.

Nick

On Thu, Mar 12, 2015 at 8:35 AM, Phyllis Wise [REDACTED] > wrote:

All good questions. We have never counted the tuition revenue or expenses in any of our business plan. So their actions are not going to affect our new COM.

I think if he really does this, he'll look childish. But that is his problem not ours. In fact it will simplify our future planning so I am not going to object. We should let their campus figure out whether this is "legal" or not. I just want to stand aside and watch. My statement will be "I always want to do what is best for the UIC CoM. We will do whatever is best for the students, faculty and staff so they are held harmless."

Phyllis

Sent from my iPhone

On Mar 12, 2015, at 6:37 AM, Nick Burbules [REDACTED] > wrote:

I have spent some time thinking about Dmitri's plans, if true.

Will this deprive us of tuition revenues from the M1 students? How does this punish us?

How can he make this decision unilaterally? What do Rick or Michael think of it?

After all the talk of cooperation and synergy yesterday, is UIC's first act really going to be picking up their toys and going home?

If this is really a UI-wide program, wouldn't the President and Board have to have a say in it?

And, what about their Senate? Or the Senates Conference? This is a major program decision affecting a large number of faculty (and students).

See you at the meeting.

From: Normand Paquin [REDACTED]
Sent: Monday, March 16, 2015 2:04 PM
To: Phyllis Wise
Subject: Time line

Phyllis,

Sorry to be cryptic. I'm in a dry-run for DHS center.

2017 time line or 2018?

Normand

Dr. Normand Paquin
Skype: normand_paquin

Tel [REDACTED]

From: Habeeb Habeeb <[REDACTED]>
Sent: Wednesday, March 25, 2015 7:56 AM
To: Phyllis Wise
Subject: Re: Rodney Davis

Good morning. Yes completely understand. I'll just work on him personally to garner his support for COM. See you soon

Habeeb

Sent wirelessly

On Mar 25, 2015, at 7:54 AM, Phyllis Wise <[REDACTED]> wrote:

Dear Habeeb,

I worry about inserting politics into the group in this way. I have always considered this group to be apolitical. Not everyone supports the Republican agenda and I am concerned that this will be seen as supporting Rodney and his entire agenda. So I would prefer that he not be invited to participate.

Thanks,
Phyllis

From: Habeeb Habeeb <[REDACTED]>
To: Phyllis M Wise <[REDACTED]>
Sent: Tuesday, March 24, 2015 1:24 PM
Subject: Rodney Davis

Hello Phyllis. I chatted with Congressman Rodney Davis about a month ago asking for his support for the COM. Told him we meet regularly and our group is completely behind it and how bio-engineering would be an incredibly unique asset . He was open to coming to our April meeting if we invite him.

I have not talked to him since then but I am in Washington DC right now and will see him tomorrow. Wondered if you would like me to bring it up again and ask him to attend our April meeting to hear from our group. I am ok either way and will leave it up to you to decide depending on your agenda items. Rodney's close friend is Rauner's chief of staff and Rodney is emerging as an influential person in Illinois politics. Let me know either way.

Thank you
Habeeb
Cell <[REDACTED]>

Habeeb Habeeb
Sent wirelessly

From: Jennifer Woodard [REDACTED]
Sent: Wednesday, March 25, 2015 6:02 PM
To: Phyllis Wise
Subject: Fwd: FW: Notes on Center for Computational Biotech and Genomic Medicine, NSF I/UCRC

Note participants on industry side. These are our target "investment" opportunities for COM. Safe and productive travels to CA!

----- Forwarded message -----

From: Warren Ribley <wribley@ibio.org>
Date: Wed, Mar 25, 2015 at 5:27 PM
Subject: FW: Notes on Center for Computational Biotech and Genomic Medicine, NSF I/UCRC
To: "jcollins@medicaldistrict.org" <jcollins@medicaldistrict.org>
Cc: "jfrerichs@illinois.edu" [REDACTED]

John & Jennifer,

Hope all is well. Wanted to pass this along. It's a funding proposal that UIUC, U of C and Mayo are pursuing. It likely doesn't have connections to CAPRICORN but wanted you to be aware just in case. Jennifer, looks like there could be a connection to the new College and big data.



Warren Ribley
President & CEO

Office: 312.422.1111
Fax: 312.422.1145



wribley@ibio.org
www.ibio.org

65 EAST WACKER PLACE SUITE 1600 CHICAGO IL 60601

From: Frerichs, Laura Appenzeller [mailto:lfrerich@illinois.edu]
Sent: Thursday, March 19, 2015 10:35 AM
To: Warren Ribley
Subject: Notes on Center for Computational Biotech and Genomic Medicine, NSF I/UCRC

Warren,

Here is more information on the Center for Computational Biotech and Genomic Medicine, NSF I/UCRC.

Center for Computational Biotech and Genomic Medicine, NSF I/UCRC

General Notes about this new NSF Center from the planning session

Interdisciplinary team from UIUC, Mayo, University of Chicago (including Argonne Lab)

- UIUC: engineering and genomic biology, HPC expertise
- Mayo: individualized medicine, clinical research
- U of C: genomic biology, Argonne Lab

Industry partners in attendance, a total of 41 attended the March planning session:

- Big corporate attendee examples: Intel Labs, Google Genomics, Agilent Technologies, Proctor and Gamble, Abbvie, Dell, Eli Lilly, Abbott, IBM, Cray, Monsanto, BASF, Dow Agrosciences, Oracle, Strand, Takeda
- Other small companies specializing in genomics as well

Eli Lily, IBM, Strand, Takeda are committed medical partners

List of all participants are here: http://go.illinois.edu/ccbgm_meeting

Mayo discussed Precision Medicine as a priority: they were so excited it was in the Obama State of the Union address, now in JAMA too, Mayo was an early leader.

Andreas, Dean of UIUC College of Engineering, said students considering UIUC Engineering are increasingly interested in medicine, i.e. studying computer science because of interests in solving major world problems such as health, hunger. Increasing interest in bioengineering.

The shift towards computational genomics:

- Reducing cost of genome
- Data deluge: .5 Petabytes every 6 months, dwarfs Moore's law
- Unfettered technology analytics, tailoring big data to precision biotech for individualized medicine. Actionable intelligence from big multi-omics data.
- Algorithms, statistics and computing methods for human genomics, crop, and animal sciences, create precompetitive interaction among companies to advance these capabilities.

Example:

1. Capture Genomic Data
2. Inputs on wireless sensor data
3. Customized platforms: machine learning, game theory, data mining

4. Actionable intelligence, models that drive biotech

Challenges: biological modeling, algorithm design, interface development from genomics imaging

Mayo Biobank: blood bank with samples from 50,000+ patients (tissue, DNA), tied to EMR and sequencing information, robotics for storage and tracking. Cover a wide variety of disease states. Continues existing partnership between Mayo and UIUC/NCSA on computational genomics.

University of Chicago:

- Institute for Genomics & Systems Biology, joint center with UofC Biology and Argonne computing for Genomic Data Commons

Center approach:

1. Identify biological and technical needs: with industry partner feedback
2. Algorithm and pipeline, machine architecture development
3. Apply to real datasets, scalability issues for software

The NSF I/UICRC Program – encourage collaboration with the other NSF funded centers

- UCSF Dean: medicine cannot ignore CS and engineering, it needs it
- Other center themes: semantic computing, data visualization, forensics, intelligent storage, IT security, embedded systems, multicore computing, 3D printing, smart infrastructures, clean energy
- 67 centers with 191 sites, 2,077 students involved (helps to screen talent in specialized areas of interest), \$14.5 million in funding with an 8:1 leverage of outside funding

IUCRC Membership agreement is standard for all universities for all industry partners, annual fee membership

- Patents rights held by the university, non-exclusive royalty free rights to center members
 - Typically can also freely use software produced by the center, if seeking to build upon for industry product, need to pursue a license. Google remarked that having all software available open source is preferred.
- Companies wishing to exercise rights for royalty-free license pay for the costs of the patent application and maintenance
- If only one company seeks a license, that company may obtain an exclusive fee-bearing license
- March-in-rights by the federal government
- Publication delay policy, faculty cannot publish until the industrial advisory board reviews first

- Advisory board – one representative from each company per membership
- Multi-year membership, but have rights to leave every year (commit annually)
- Typically funding from other federal agencies is used as matching funding, there is a mechanism for others agencies to join. For example, DOE provided \$2 million to a center to be able to have them address questions.

Documents from this session available at http://go.illinois.edu/ccbgm_meeting

Laura

Laura A. Frerichs

(217) 333-8323 office, [REDACTED] cell

Director, University of Illinois Research Park

Director of Economic Development, UIUC Public Engagement

www.researchpark.illinois.edu

From: Ilesanmi Adesida [REDACTED]
Sent: Thursday, March 26, 2015 9:50 AM
To: Greene, Donna
Subject: Re: Exciting news

Thanks, Donna. We are indeed very grateful to you and the other members of Carle's Board of Directors who recognized the importance of this path and approved Carle's participation. This is going to be a great enterprise with time. We have received messages from so many people from around the world who want to be part of this experiment. My hope is that many years from now, Carle will be close to Mayo in terms of being able to attract patients from all over the world. This medical school should bring the world to Champaign! Yes to the corn fields. Thanks again for your vision in making this happen.

[REDACTED] and I are in the [REDACTED] for the week. We return tomorrow. We have been taking in the sun here.

Cheers,

Ade

On Tuesday, March 24, 2015, Greene, Donna <Donna.Greene@busey.com> wrote:

Hello Ade,

I have been meaning to email you and acknowledge the excitement around the new College of Medicine. This is wonderful news and a real jolt for the University, Carle, and the community (the world, really!). I know that you were an advocate and one of those with responsibility to make this happen. I recognize that there is still a lot of work to do, but there is no doubt in my mind that the UI and Carle leadership will see it through.

I will look forward to catching up with you one of these days!

Best regards to [REDACTED] too!

-Donna

Donna Greene, CFP®
Executive Vice President | Senior Managing Director
100 W. University Ave.
Champaign, IL 61820
P: 217.351.6619 | Ext:56619
C: [REDACTED]
F: 217.351.6551



The information contained in this e-mail is privileged and confidential. Unless otherwise indicated or obvious from the message, this is intended only for the individual(s) listed above. Please see our Privacy Notices at <http://www.busey.com>.

From: Normand Paquin [REDACTED]
Sent: Thursday, March 26, 2015 4:58 PM
To: Phyllis Wise
Subject: About Jim

Should I pass along advice that the might want to ask [REDACTED] or advice?

Jim did tell me he had not spoken to Michelle since the meeting but I think he is a bit weary at this point about what he is and is not being told.

It's tricky. And we do need to think about the blame game and what we want in the end.

Is it worth discussing? I know you are meeting with [REDACTED] leadership.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Te [REDACTED]

From: Jennifer Woodard [REDACTED]
Sent: Tuesday, March 31, 2015 12:16 PM
To: Phyllis Wise
Subject: Fwd: UIUC College of Medicine

I am forwarding you this entire message to shortcut to the substance of it. I think it is VERY important that you be at both dinner on Wed. the 19th of April and present on the 20th. This is a unique opportunity. Dr. Michelle Russell told me that BCG will send a representative - or two- to both to support this COM initiative and be a facilitator in a discussion about industry investment. Let's talk asap.

I was in [REDACTED] this morning [REDACTED] and have meetings this afternoon with search firm regarding IMDC executive director candidates(process going well).

Hope your week goes well. I am very optimistic about this direction. With apologies, I have not had the chance to prepare briefing memo - but it is on my agenda for tomorrow.

Best,

Jennifer

----- Forwarded message -----
From: **Warren Ribley** <wribley@ibio.org>
Date: Mon, Mar 30, 2015 at 4:40 PM
Subject: UIUC College of Medicine
To: ' [REDACTED] <[REDACTED]>

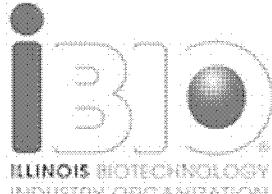
Hi Jennifer,

Hope all is well. Our iBIO Board is meeting April 20 in the afternoon in Evanston. That would be the earliest opportunity for the Chancellor to present on the new initiative. It precedes our Industry Exposition (IndEx) the next day at the Hotel Orrington which is one of our largest annual events. It would be a great day to network with industry leaders also. I'm sure there are some U of I attendees but they should make a push to get some people there and we could likely set up some good opportunities to showcase the new College initiative. IndEx is a fee generating event for us and an important one. There is also a private dinner that I could see including the Chancellor on Wednesday evening also with the Board and other VIPs. The new Lt. Gov is speaking on Thursday morning but I don't expect her at the dinner. The next Board meeting is in June, probably in Chicago. The CEO roundtable dinners are more random, scheduled around specific sponsored events (meaning paid for by... it's all about the fundraising!!).

I had a meeting with Terry Mazany this morning and we covered the IMD. He noted your conversation last week. He thinks you are doing the right things.

Please let me know if there is any interest on the 20th/21st. Otherwise we can look at other opportunities.
Thanks.

Warren



Warren Ribley

PRESIDENT & CEO

Office: 312.422.1111
Fax: 312.422.1145



wribley@ibio.org
www.ibio.org

65 EAST WACKER PLACE SUITE 1600 CHICAGO IL 60601

From: [REDACTED]
Sent: Wednesday, April 01, 2015 9:40 AM
To: Phyllis Wise
Subject: Re: UIUC College of Medicine

Just had great meeting with Jim Schultz. He and Governor want to help with industry investment in COM

Sent from my iPhone

On Apr 1, 2015, at 9:12 AM, Phyllis Wise <[REDACTED]> wrote:

I'll call you today.

Sent from my iPhone

On Apr 1, 2015, at 3:59 AM, [REDACTED] wrote:

[REDACTED] Now for moving. Let's think about a surrogate for you for April IBIO board meeting. And perhaps include BCG partner as well. I want the COM on members' radar screen as soon as possible. We could then set up later date... Whether dinner or June board meeting... For you to be present. Let's talk when you have some time.

Sent from my iPhone

On Mar 31, 2015, at 10:24 PM, Phyllis Wise <[REDACTED]> wrote:

Hope your [REDACTED] went easily.

Sent from my iPhone

On Mar 31, 2015, at 12:15 PM, Jennifer Woodard

<j[REDACTED]> wrote:

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Hope your week goes well. I am very optimistic about this direction. With apologies, I have not had the chance to prepare briefing memo - but it is on my agenda for tomorrow.

Best,

Jennifer

----- Forwarded message -----
From: **Warren Ribley** <wribley@ibio.org>
Date: Mon, Mar 30, 2015 at 4:40 PM
Subject: UIUC College of Medicine
To: [REDACTED]
[REDACTED]

Hi Jennifer,

Hope all is well. Our iBIO Board is meeting April 20 in the afternoon in Evanston. That would be the earliest opportunity for the Chancellor to present on the new initiative. It precedes our Industry Exposition (IndEx) the next day at the Hotel Orrington which is one of our largest annual events. It would be a great day to network with industry leaders also. I'm sure there are some U of I attendees but they should make a push to get some people there and we could likely set up some good opportunities to showcase the new College initiative. IndEx is a fee generating event for us and an important one. There is also a private dinner that I could see including the Chancellor on Wednesday evening also with the Board and other VIPs. The new Lt. Gov is speaking on Thursday morning but I don't expect her at the dinner. The next Board meeting is in June, probably in Chicago. The CEO roundtable dinners are more random, scheduled around specific sponsored events (meaning paid for by... it's all about the fundraising!!).

I had a meeting with Terry Mazany this morning and we covered the IMD. He noted your conversation last week. He thinks you are doing the right things.

Please let me know if there is any interest on
the 20th/21st. Otherwise we can look at other
opportunities. Thanks.

Warren

<image001.png>

From: Phyllis Wise [REDACTED]
Sent: Tuesday, April 07, 2015 6:34 AM
To: [REDACTED] and Dan Peterso; LRC; Tracy Molly
Subject: CR: [REDACTED]

I talked with [REDACTED] in the taxi on the way back to the hotel. She was particularly nice last night, compared to all the previous conversations I have had with her. So I took advantage of the opportunity to thank her again for attending the dinner. I told her that I hope that she would think about her gift for the campaign. She had told me that although she was not wealthy, she did not have to worry about money. She told me she would definitely give thought to her gift for the campaign. But she thought more importantly, it would be important to urge [REDACTED] to give a gift. She said he was really into this idea of having a fund to give a "prize". I think she had in mind the concept that she had talked about at dinner: a prize for entrepreneurship. This is the first time she has ever said that [REDACTED] wealth could be tapped for Illinois if we can attract his attention.

Follow up: this makes it really worthwhile to find a time to have dinner/lunch/meeting with just the two of them to pursue.

[REDACTED] Leanne has suggested that [REDACTED] should be approached with a \$5M ask for the COM. The discussion last night did not give me the impression that he is ready for this level of gift or that the COM was a point of passion. He has been cultivated by PSU for many years in ways that we have not. He talked about Chem Eng during the evening and did not seem particularly interested in the COM.

Follow up: A lot more has to be done to probe where his real interests lie.

From: Peterson, Dan C <dcpeters@illinois.edu>
Sent: Saturday, April 11, 2015 7:42 AM
To: Phyllis Wise
Subject: Re:

Well done!

Sent from my iPhone. Apologies for typos.

On Apr 11, 2015, at 7:29 AM, Phyllis Wise [REDACTED] > wrote:

Dear [REDACTED]

Let me give you a bit of background from the other receptions that we have had. The audience is a group of people chosen by the host, in this case Peter, and our folks. They are usually influential people in the community, people who we believe are or could be passionate about the establishment of a College of Medicine and its impact on Urbana-Champaign, central Illinois and the entire state - if not the nation, and people who we hope will invest in the College. There have been between 10-30 people. I have not seen the list of people who have been invited to this event, so I am not sure how many people have RSVP'd that they will be there. I am copying Dan Peterson and Leanne Barnhart since they may know more details.

There is usually someone from Carle (usually Jim Leonard or Matt Gibb), a faculty member from the College of Engineering who is doing biomedical research (usually Dean Cangellaris, Rashid Bashir - Head of Bioengineering, or Steve Boppart), and myself. It is wonderful that you will be able to speak from your experience and perspective. We each speak for 3-5 minutes about why this is so important. We want to leave most of the time for questions from the audience. We have not "passed the plate" since some of the hosts have said specifically that they do not want us to ask for money. But if you feel so moved, it would be great for you to say how important it is for us in the community to contribute financially. You may know that the business plan calls for us to raise at least \$135M over 10 years (\$115M in the first 2-3 years) for the College be viable. I mentally round this up to \$200M since donors usually like to designate their gift to a specific part of the mission and we will need to cover the overall mission of the College.

I'd be happy to call and talk with you if you would like to talk further.

I look forward to seeing you. We really appreciate your support.

Best,
Phyllis

From: [REDACTED]
To: Peter B. Fox <peterf@fox-companies.com>
Cc: Phyllis Wise [REDACTED] Heather Tucker <heathert@fox-companies.com>
Sent: Friday, April 10, 2015 8:52 PM
Subject: Re:

How long should I speak?

Who is audience?

Who else is speaking?

Are we passing the plate at the meeting?

Do I get a commission? :)

From: "Peter B. Fox" <peterf@fox-companies.com>
To: [REDACTED] "Heather Tucker" <heathert@fox-companies.com>
Cc: "Phyllis Wise" <Phyllis.Wise@fox.com>
Sent: Friday, April 10, 2015 8:39:10 PM

Are we set agenda for [REDACTED] to speak tues
Make sure we have agenda
I want to intro speakers

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

From: Peter B. Fox <peterf@fox-companies.com>
Sent: Saturday, April 11, 2015 8:29 AM
To: Barnhart, Leanne Rodgers
Cc: Phyllis Wise [REDACTED] Heather Tucker; Peterson, Dan C
Subject: Re:

Ok people need to hear from a person who has real success taking ideas to jobs [REDACTED] and david kranz are the best examples the audience will only care about jobs and tangible health care improvement

Sent from my iPhone

Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

On Apr 11, 2015, at 9:25 AM, Barnhart, Leanne Rodgers <leanne1@illinois.edu> wrote:

Hello,

Dr. Leonard is confirmed to attend this event, as is Dean Cangellaris.

The speaking order which has been used previously and has worked very well is:

Host (Peter) welcomes everyone and introduces Chancellor Wise

Chancellor Wise -- speaks 3-5 minutes high level overview of the proposed college
-highly selective class do just 25, growing to 50
- engineering-infused curriculum
-no state operating support
-revenue model
Introduces Dr. Jim Leonard and Dean Cangellaris

Dr. Jim Leonard -- talks 3-5 minutes about what's in it for Carle:

- Carle/physicians
- will be able to bring new developments, roll out new technology to the community sooner with this partnership

Andreas (10-12 minutes):

- conveys the uniqueness of the proposed College of Medicine
- provides a couple of examples of the direct end use research already being conducted at Illinois (analytics, diagnostics, robotics)

All three speakers:

Conduct Q+A, wrap-up/thank you and indicate who to talk with for follow up

This event will add the emphasis on community development, which is so terrific. Peter, perhaps you would like to adjust this order to build it [REDACTED] where it seems to fit best? And, the time allocation will need to be adjusted appropriately for the number of speakers.

I hope this is helpful.

Leanne

On Apr 11, 2015, at 7:29 AM, "Phyllis Wise" <[REDACTED]> wrote:

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I'd be happy to call and talk with you if you would like to talk further.

I look forward to seeing you. We really appreciate your support.

Best,
Phyllis

From: [REDACTED]
To: Peter B. Fox <peterf@fox-companies.com>
Cc: Phyllis Wise <[\[REDACTED\]](#)>; Heather Tucker <heathert@fox-companies.com>
Sent: Friday, April 10, 2015 8:52 PM
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From: "Peter B. Fox" <peterf@fox-companies.com>
To: [REDACTED], "Heather Tucker"
<heatherf@fox-companies.com>
Cc: "Phyllis Wise" [REDACTED]
Sent: Friday, April 10, 2015 8:39:10 PM

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O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

From: Peter B. Fox <peterf@fox-companies.com>
Sent: Saturday, April 11, 2015 9:55 AM
To: Phyllis Wise
Subject: FW: Re:

I know [REDACTED] would be happy to help
Hell also [REDACTED]
He has a very good eye for marketing material

From: [REDACTED]
Sent: Saturday, April 11, 2015 9:00 AM
To: Leanne Rodgers Barnhart
Cc: Peter B. Fox; Heather Tucker; Dan C Peterson; Phyllis Wise
Subject: Re:

Is there a fund raising program for this effort? Given the nut you need I'm sure you have a very professional, well-resourced effort with slick marketing materials.

I searched on google and the university website and came up empty. I remember that there was a website about the new school, but I cannot find it. Please send me a brochure with giving options.

From: "Leanne Rodgers Barnhart" <leanne1@illinois.edu>
To: "Phyllis Wise" <[REDACTED]>
Cc: [REDACTED], "Peter B. Fox" <peterf@fox-companies.com>, "Heather Tucker" <heathert@fox-companies.com>, "Dan C Peterson" <dcpeters@illinois.edu>
Sent: Saturday, April 11, 2015 8:25:41 AM
Subject: Re:

Hello,

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Phyllis

From: [REDACTED]
To: Peter B. Fox <peterf@fox-companies.com>
Cc: Phyllis Wise [REDACTED]; Heather Tucker <heathert@fox-companies.com>
Sent: Friday, April 10, 2015 8:52 PM
Subject: Re:

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Do I get a commission? :)

From: "Peter B. Fox" <peterf@fox-companies.com>

To: [REDACTED] "Heather Tucker" <heathert@fox-companies.com>

Cc: "Phyllis Wise" <[REDACTED]>

Sent: Friday, April 10, 2015 8:39:10 PM

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Make sure we have agenda

I want to intro speakers

Sent from my iPhone

Peter B. Fox

1909 Fox Drive

Champaign, IL 61820

O: 217-351-1430 ext. 15 | C: [REDACTED]

peterf@fox-companies.com

www.fox-companies.com

From: Leanne Courson [REDACTED]
Sent: Monday, April 13, 2015 3:08 PM
To: Molly M. Tracy
Subject: Fwd: Re:

Sent from my iPhone

Begin forwarded message:

From: Phyllis Wise [REDACTED]m>
Date: April 11, 2015 at 8:39:15 AM CDT
To: "Peter B. Fox" <peterf@fox-companies.com>, [REDACTED]
Cc: Heather Tucker <heathert@fox-companies.com>
Subject: Re:
Reply-To: Phyllis Wise [REDACTED]>

Glad you said it....

From: Peter B. Fox <peterf@fox-companies.com>
To: [REDACTED]
Cc: Phyllis Wise <[REDACTED]>; Heather Tucker <heathert@fox-companies.com>
Sent: Saturday, April 11, 2015 8:30 AM
Subject: Re:

No commission in fact you have to donate

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

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To: [REDACTED] "Heather Tucker"
<heathert@tox-companies.com>
Cc: "Phyllis Wise" <[REDACTED]>
Sent: Friday, April 10, 2015 8:39:10 PM

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1909 Fox Drive
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peterf@fox-companies.com
www.fox-companies.com

From: Cangellaris, Andreas C <cangella@illinois.edu>
Sent: Monday, April 13, 2015 5:49 PM
To: Peter B. Fox; Phyllis Wise; James C. Leonard (james.leonard@carle.com); Frerichs, Laura Appenzeller; Barnhart, Leanne Rodgers; 'habeeb@bpcinc.com'; Lykins, Greg (Gregory.Lykins@busey.com); Stephens, Rick L.
Subject: RE: luncheon

It will be fun!

Looking forward to it!

- Andreas

From: Peter B. Fox [<mailto:peterf@fox-companies.com>]
Sent: Monday, April 13, 2015 5:16 PM
To: Phyllis Wise; James C. Leonard (james.leonard@carle.com); Frerichs, Laura Appenzeller; Barnhart, Leanne Rodgers; 'habeeb@bpcinc.com'; Lykins, Greg (Gregory.Lykins@busey.com); Stephens, Rick L.; Cangellaris, Andreas C
Subject: luncheon

I am looking forward to lunch tomorrow. I know that the goal is to educate the community and to also raise money for the medical school.

I believe our audience will care about jobs and the prospect for access to healthcare advances.

I specifically asked [REDACTED] to speak as he has created jobs that pay well and jobs that relate to the medical initiative.

Regards,
Peter



Peter B. Fox
Chairman
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

From: Frerichs, Laura Appenzeller <lfrerich@illinois.edu>
Sent: Monday, April 13, 2015 10:00 PM
To: Phyllis Wise
Subject: RE: luncheon

I understand, just wanted you to be aware that he is not my favorite and very negative about COM, IVentures, and various other things.

From: Phyllis Wise [mailto:
Sent: Monday, April 13, 2015 9:58 PM
To: Frerichs, Laura Appenzeller
Subject: Re: luncheon

I am aware of that. But I hope he behaves himself tomorrow. Peter insists on having him on the program. Given our hopes that [REDACTED] will give substantially from a financial perspective, I didn't see anyway around letting him talk.

Sent from my iPhone

On Apr 13, 2015, at 9:32 PM, Frerichs, Laura Appenzeller <lfrerich@illinois.edu> wrote:

[REDACTED] has written papers against the COM that he sent to me. [REDACTED] employs him. I will tell you more later.

From: Phyllis Wise [mailto:
Sent: Monday, April 13, 2015 6:39 PM
To: Peter B. Fox
Cc: James C. Leonard (james.leonard@carle.com); Frerichs, Laura Appenzeller; Barnhart, Leanne Rodgers; habeeb@bpcinc.com; Lykins, Greg (Gregory.Lykins@busey.com); Stephens, Rick L.; Cangellaris, Andreas C
Subject: Re: luncheon

Peter,

[REDACTED] will add a critical perspective. We'll make sure he has time to speak.

Thanks so much for hosting this event and for all your support.

See you tomorrow.
Phyllis

Sent from my iPhone

On Apr 13, 2015, at 5:16 PM, Peter B. Fox <peterf@fox-companies.com> wrote:

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Regards,
Peter

<image001.png>

Peter B. Fox
Chairman
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

From: Lykins, Greg <Gregory.Lykins@busey.com>
Sent: Tuesday, April 14, 2015 7:03 AM
To: Phyllis Wise
Cc: Habeeb Habeeb; Rick Stephens; James. Leonard; Tracy Molly
Subject: Re: thanks!

Phyllis,

You are welcome .. [REDACTED] is very impressive and had lots of good things about the U of I Team .. Nice to hear! Great work building the relationship.

See you today.

Greg

Sent from my iPad

On Apr 14, 2015, at 6:47 AM, Phyllis Wise <[REDACTED]> wrote:

Dear Greg, Rick, Habeeb, and Jim,

I have been meaning to write you since last week and am only getting around to it now. Thank you so much for meeting with [REDACTED]. I know he came away impressed with you, the roles you have played in establishing the College of Medicine, and the strengths of Carle and of the leaders in Urbana-Champaign and central Illinois. We really appreciate the time that you spent with [REDACTED]. I don't think he was aware of the jewels we have here. Molly arranged the rest of the week introducing him to more of our faculty and the space that we will turn into the [REDACTED] in Everitt Hall, the bioengineering building. We also showed him the empty parking lot, which could someday become a building for the College. I hope he will see this as a place to continue to invest in.

Again, thank you so much!

Best,
Phyllis

The information contained in this e-mail is privileged and confidential. Unless otherwise indicated or obvious from the message, this is intended only for the individual(s) listed above. Please see our Privacy Notices at <http://www.busey.com>.

From: Phyllis Wise
Sent: Tuesday, April 14, 2015 9:50 PM
To: [REDACTED] and Dan Peterso; Tracy Molly; LRC; Phyllis Wise
Subject: Fw: thank you!

FYI. And I wrote a separate note to Peter:

Peter,

I owe you a special thanks. You are really amazing. As you say about others: you are the best. I know how busy you are in NC, but you seem to make time for us and you always do everything with such professionalism and panache.

Truly thanks,
Phyllis

----- Forwarded Message -----

From: Habeeb Habeeb <habeeb@bpclnc.com>
To: "Lykins, Greg" <Gregory.Lykins@busey.com>; Peter B. Fox <peterf@fox-companies.com>; Phyllis Wise <Phyllis.Wise@bpclnc.com>; Rick Stephens <rick@investres.net>; "Meyer, Chris" <cmeyer@oktocom.com>
Sent: Tuesday, April 14, 2015 9:32 PM
Subject: RE: thank you!

Peter: You always bring out a great crowd. THANK YOU!!! Well done.

[REDACTED] and Andreas both did a terrific job.

Phyllis; You are a dynamo, an over-achiever, and you never quit. You are wonderful and inspiring! Thank you for caring about our community as if you have been here for decades. We love you!

We have a terrific University, a terrific community, and everyone on this email makes a wonderful group. So glad to be working together for the benefit of the Community, the State, the Nation, and humanity as a whole. This will indeed benefit all of humanity.

Habeeb

Habeeb Habeeb, MBA, CFCI | *CEO, President*
BPC

From: Lykins, Greg [<mailto:Gregory.Lykins@busey.com>]
Sent: Tuesday, April 14, 2015 8:45 PM
To: Peter B. Fox
Cc: Phyllis Wise; Rick Stephens; Habeeb Habeeb; Meyer, Chris
Subject: Re: thank you!

Thank you Peter for organizing today's successful event and Habeeb, we want to run for office! You were terrific!

And [REDACTED] was great!

Greg

Sent from my iPad

On Apr 14, 2015, at 8:42 PM, Peter B. Fox <peterf@fox-companies.com> wrote:

My pleasure

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

On Apr 14, 2015, at 8:37 PM, Phyllis Wise <[REDACTED]> wrote:

Dear Peter, Rick, Greg, and Habeeb,

Thank you so much for hosting the wonderful luncheon and discussion today. I know that everyone came away more informed and I hope that everyone was excited about the goals that Carle and we are doing together. You have been amazing advocates, supporters, and advisors. I could never imagine any better community leaders and friends.

All of us are deeply grateful!

Warm wishes,
Phyllis

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From: Rick Stephens <rick@investres.net>
Sent: Tuesday, April 14, 2015 11:15 PM
To: Habeeb Habeeb
Cc: Lykins, Greg; Peter B. Fox; Phyllis Wise; Meyer, Chris
Subject: Re: thank you!

Great job Peter, Phyllis and Team COM! It was great to have all mayors there as well as Chamber reps. I think community is starting to rev up for the vision. Let's keep the pedal to the metal.

On Apr 14, 2015, at 9:32 PM, Habeeb Habeeb <habeeb@bpcinc.com> wrote:

Peter: You always bring out a great crowd. THANK YOU!!! Well done.

[REDACTED] and Andreas both did a terrific job.

Phyllis; You are a dynamo, an over-achiever, and you never quit. You are wonderful and inspiring! Thank you for caring about our community as if you have been here for decades. We love you!

We have a terrific University, a terrific community, and everyone on this email makes a wonderful group. So glad to be working together for the benefit of the Community, the State, the Nation, and humanity as a whole. This will indeed benefit all of humanity.

Habeeb

Habeeb Habeeb, MBA, CFCI | *CEO, President*

BPC

From: Lykins, Greg [<mailto:Gregory.Lykins@busey.com>]
Sent: Tuesday, April 14, 2015 8:45 PM
To: Peter B. Fox
Cc: Phyllis Wise; Rick Stephens; Habeeb Habeeb; Meyer, Chris
Subject: Re: thank you!

Thank you Peter for organizing today's successful event and Habeeb, we want to run for office! You were terrific!

And [REDACTED] was great!

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www.fox-companies.com

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All of us are deeply grateful!

Warm wishes,
Phyllis

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From: Phyllis Wise [REDACTED]
Sent: Wednesday, April 15, 2015 8:53 AM
To: [REDACTED] and Dan Peterso; LRC; Tracy Molly
Subject: Fw: thank you!

I hope that Peter and [REDACTED] really stay committed...

----- Forwarded Message -----

From: Peter B. Fox <peterf@fox-companies.com>
To: Phyllis Wise <[\[REDACTED\]](mailto:[REDACTED])>
Sent: Wednesday, April 15, 2015 7:25 AM
Subject: Re: thank you!

[REDACTED] and I are committed here
Anytime there is something to be done I'll be here

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430
ext. 15 | C: [REDACTED]

peterf@fox-companies.com
www.fox-companies.com

On Apr 14, 2015, at 9:47 PM, Phyllis Wise [REDACTED] wrote:

Peter,

I owe you a special thanks. You are really amazing. As you say about others: you are the best. I know how busy you are in NC, but you seem to make time for us and you always do everything with such professionalism and panache.

Truly thanks,
Phyllis

From: Peter B. Fox <peterf@fox-companies.com>
To: Phyllis Wise <[\[REDACTED\]](mailto:[REDACTED])>
Cc: Rick Stephens <rick@investres.net>; Greg Lykins <gregory.lykins@busey.com>; Habeeb Habeeb <habeeb@bpcinc.com>
Sent: Tuesday, April 14, 2015 8:42 PM
Subject: Re: thank you!

My pleasure

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820

O: 217-351-1430
ext. 15 | C: [REDACTED]

peterf@fox-companies.com
www.fox-companies.com

On Apr 14, 2015, at 8:37 PM, Phyllis Wise [REDACTED] wrote:

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All of us are deeply grateful!

Warm wishes,
Phyllis

From: Lykins, Greg <Gregory.Lykins@busey.com>
Sent: Saturday, April 18, 2015 8:41 AM
To: Phyllis Wise
Cc: Andreas C. Cangellaris; [REDACTED] Dan C Peterson
Subject: Re: Thoughts about tonight's performance at Krannert ...

Phyllis,

I think it would be great for you to convey this further perspective to [REDACTED] and Rick to reinforce an already great visit while it is still fresh in their minds. It is even more impactful when thinking of the other areas in addition to neuroscience.

Thanks and have a safe trip. We will enjoy Dick being with us.

Greg

Sent from my iPad

On Apr 18, 2015, at 8:32 AM, Phyllis Wis [REDACTED] wrote:

Greg,

Thank you so much for giving Andreas and [REDACTED] this background.

I thought the session yesterday was quite wonderful. Jennifer chose to concentrate on what we and Carle do in the area of neuroscience and it is definitely an area of strength that brings together our existing engineering and biomedical expertise. Imagine what we could do with a real medical school. We also have considerable expertise in cancer, bringing together faculty in engineering, molecular and cellular biology, and clinicians at Carle - but this may not be as mature. An area that I hope we will grow with new faculty is stem cell biology and engineering. You can imagine new treatments and cures for diabetes (an area of interest for the [REDACTED] since their [REDACTED] neurodegenerative diseases, and so many others.

Thanks again for everything that you are doing!!!

Phyllis

P.S. I am so sorry that I will miss this evening!

From: "Lykins, Greg" <Gregory.Lykins@busey.com>
To: Andreas C. Cangellaris <cangella@illinois.edu>; [REDACTED]
Cc: Phyllis M Wise <[REDACTED]>; Dan C Peterson <dcpeters@illinois.edu>
Sent: Saturday, April 18, 2015 8:21 AM
Subject: Thoughts about tonight's performance at Krannert ...

Good Morning Andreas and [REDACTED]

We are looking forward to being with you and [REDACTED] this evening. I hope it is relaxing and enjoyable.

I just wanted to give you a little heads up. I currently have you both sitting next to [REDACTED] and [REDACTED] at the performance. I know you have met [REDACTED]. He is [REDACTED] [REDACTED]... a long time business man who has been tremendously successful in the TV

and Radio business (Champaign, Peoria and especially San Diego). [REDACTED] have also invested heavily in banking and a number of other businesses. He grew up in [REDACTED]

[REDACTED] [REDACTED] is from [REDACTED]
[REDACTED] They travel extensively but split their year between [REDACTED] and [REDACTED]
[REDACTED] They are a delightful "down to earth" couple. She is [REDACTED]
and he [REDACTED] They "love" Phyllis ...

I share all of this because [REDACTED] is tremendously excited about the medical school and is considering at least a "seven digit" contribution to the medical school. As you probably know, [REDACTED] Rick Stephens and I [REDACTED] on the Medical School and [REDACTED] was tremendously excited. (We also noted the remarkable research work being conducted by a younger Cangellaris!) I will tell you I have never seen him more excited about any project or activity.

Sorry if this is too much info .. but thought it might be helpful ..

I hope you both relax and enjoy this evening and enjoy the group. By the way, I am not wearing a tie.

Let me know if you have any questions. Thanks,

Greg

Sent from my iPad

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From: Tracy, Molly M <mollyt@illinois.edu>
Sent: Saturday, April 18, 2015 2:56 PM
To: Lykins, Greg
Cc: Peterson, Dan C; Phyllis Wise; Cangellaris, Andreas C; [REDACTED]
Subject: Re: Thoughts about tonight's performance at Krannert ...

Thanks all. Dan has described a strategy for a multi-year contribution that would have great impact. I stand ready to help as the path emerges. Have a wonderful evening.
Molly

Sent from my iPhone

On Apr 18, 2015, at 10:58 AM, "Lykins, Greg" <Gregory.Lykins@busey.com> wrote:

Dan,

I would have added Molly on the first email .. but thought I would not add folks without your approval.

This all sounds great .. but I do think the "magic" that is necessary is to escalate the amount from low to high 7 digits is their extraordinary admiration for Phyllis .. That relationship plus the tremendous opportunity will need to be carefully crafted .. and I don't know the specific path yet.

Talk to you soon.

Greg

Sent from my iPad

On Apr 18, 2015, at 10:46 AM, Peterson, Dan C <dcpeters@illinois.edu> wrote:

Greg,

This is very helpful background. Thanks for sharing it!

I've added Molly to this string as she is our team leader for the COM.

it's very exciting to hear [REDACTED] is motivated by the COM and considering a '7 figure' gift. I'd like to offer a strategy suggestion for you to consider. Molly may upgrade it! Here goes: having unrestricted dollars for the first 10 years is priority #1 because a strong pool of these funds will secure LCME approval. Given this vital need for working capital, would [REDACTED] consider a 7 figure commitment EACH YEAR for ten years and make a pledge to this effect? I know the [REDACTED] shun publicity about their giving, but we plan to have a Founders Society with levels at \$10, 5 and 1M to recognize donors who provide the seed capital to launch the Carle-Illinois COM. I don't want to give you too much detail on this. If ther is interest, either Molly or I can meet with you and [REDACTED] for a detailed discussion.

THANKS Greg for giving this some thought and for your unwavering advocacy!

Sent from my iPhone. Apologies for typos.

On Apr 18, 2015, at 8:32 AM, Phyllis Wise [REDACTED] m> wrote:

Greg,

Thank you so much for giving Andreas and [REDACTED] this background.

I thought the session yesterday was quite wonderful. Jennifer chose to concentrate on what we and Carle do in the area of neuroscience and it is definitely an area of strength that brings together our existing engineering and biomedical expertise. Imagine what we could do with a real medical school. We also have considerable expertise in cancer, bringing together faculty in engineering, molecular and cellular biology, and clinicians at Carle - but this may not be as mature. An area that I hope we will grow with new faculty is stem cell biology and engineering. You can imagine new treatments and cures for diabetes (an area of interest for the [REDACTED] since their [REDACTED], neurodegenerative diseases, and so many others.

Thanks again for everything that you are doing!!!

Phyllis

P.S. I am so sorry that I will miss this evening!

From: "Lykins, Greg" <Gregory.Lykins@busey.com>

To: Andreas C. Cangellaris <cangella@illinois.edu>; [REDACTED]

Cc: Phyllis M Wwise <Phyllis.M.Wwise@illinois.edu>; Dan C Peterson <dcpeters@illinois.edu>

Sent: Saturday, April 18, 2015 8:21 AM

Subject: Thoughts about tonight's performance at Krannert ...

Good Morning Andreas and [REDACTED]

We are looking forward to being with you and [REDACTED] this evening. I hope it is relaxing and enjoyable.

I just wanted to give you a little heads up. I currently have you both sitting next to [REDACTED] at the performance. I know you have met [REDACTED]. He is [REDACTED] [REDACTED] .. a long time business man who has been tremendously successful in the TV and Radio business (Champaign, Peoria and especially San Diego). [REDACTED] have also invested heavily in banking and a number of other businesses. He grew up in [REDACTED]

[REDACTED] s from [REDACTED] They travel extensively but split their year between [REDACTED] and [REDACTED] [REDACTED] They are a delightful "down to earth" couple. She is [REDACTED] and he carries [REDACTED] [REDACTED] They "love" Phyllis ...

I share all of this because [REDACTED] is tremendously excited about the medical school and is considering at least a

"seven digit" contribution to the medical school. As you probably know, [REDACTED] Rick Stephens and I [REDACTED] on the Medical School and [REDACTED] was tremendously excited. (We also noted the remarkable research work being conducted by a younger Cangellaris!) I will tell you I have never seen him more excited about any project or activity.

Sorry if this is too much info .. but thought it might be helpful

..

I hope you both relax and enjoy this evening and enjoy the group. By the way, I am not wearing a tie.

Let me know if you have any questions. Thanks,

Greg

Sent from my iPad

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From: Lykins, Greg <Gregory.Lykins@busey.com>
Sent: Saturday, April 18, 2015 3:24 PM
To: Phyllis Wise
Subject: Re: yesterday

Perfect. Thanks!

Greg

Sent from my iPad

On Apr 18, 2015, at 3:20 PM, Phyllis Wise [REDACTED] wrote:

Dear Greg, Rick and Chris,

Thank you for spending the afternoon with us yesterday. I learned a great deal and I hope you did too. I thought the session was quite wonderful. Jennifer chose to concentrate on what we and Carle are doing in the area of neuroscience and it is definitely an area of strength that brings together our existing engineering and biomedical expertise. Imagine what we could do with a real medical school!

We also have considerable expertise in cancer, bringing together faculty in engineering, molecular and cellular biology, and clinicians at Carle - but this may not be as mature.

An area that I hope we will grow with new faculty is stem cell biology and engineering. Stem cells hold great promise in new treatments and cures for diabetes, particularly type 1, neurodegenerative diseases such as Alzheimer's or Parkinson's, and so many others.

Just a few thoughts that I thought you would enjoy.

Best wishes for the weekend,
Phyllis

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From: Lykins, Greg <Gregory.Lykins@busey.com>
Sent: Saturday, April 18, 2015 3:25 PM
To: Phyllis Wise
Subject: Re: yesterday

Phyllis,

If they help Type 1 Diabetes, the opportunity is unlimited.

Greg

Sent from my iPad

On Apr 18, 2015, at 3:20 PM, Phyllis Wise [REDACTED] wrote:

Dear Greg, Rick and Chris,

Thank you for spending the afternoon with us yesterday. I learned a great deal and I hope you did too. I thought the session was quite wonderful. Jennifer chose to concentrate on what we and Carle are doing in the area of neuroscience and it is definitely an area of strength that brings together our existing engineering and biomedical expertise. Imagine what we could do with a real medical school!

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Phyllis

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From: Cangellaris, Andreas C <cangella@illinois.edu>
Sent: Saturday, April 18, 2015 3:32 PM
To: Lykins, Greg
Cc: [REDACTED] Phyllis M Wise; Peterson, Dan C
Subject: Re: Thoughts about tonight's performance at Krannert ...

Greg,

Thank you so much for the background information about [REDACTED] and I look forward to a great evening!

Andreas

> On Apr 18, 2015, at 8:21 AM, Lykins, Greg <Gregory.Lykins@busey.com> wrote:

>

> Good Morning Andreas and [REDACTED]

>

> We are looking forward to being with you and [REDACTED] this evening. I hope it is relaxing and enjoyable.

>

> I just wanted to give you a little heads up. I currently have you both sitting next to [REDACTED] at the performance. I know you have met [REDACTED]. He is [REDACTED].. a long time business man who has been tremendously successful in the TV and Radio business (Champaign, Peoria and especially San Diego). [REDACTED] have also invested heavily in banking and a number of other businesses. He grew up [REDACTED]

[REDACTED] They travel extensively but split their year between [REDACTED] from [REDACTED] and [REDACTED] They are a delightful "down to earth" couple. She is [REDACTED] and he [REDACTED] [REDACTED] They "love" Phyllis ...

>

> I share all of this because [REDACTED] is tremendously excited about the medical school and is considering at least a "seven digit" contribution to the medical school. As you probably know [REDACTED] Dick Stephens and I [REDACTED]

> [REDACTED] on the Medical School and [REDACTED] was tremendously excited. (We also noted the remarkable research work being conducted by a younger Cangellaris!) I will tell you I have never seen him more excited about any project or activity.

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> Sorry if this is too much info .. but thought it might be helpful ..

>

> I hope you both relax and enjoy this evening and enjoy the group. By the way, I am not wearing a tie.

>

> Let me know if you have any questions. Thanks,

>

> Greg

>

> Sent from my iPad

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From: Chris Meyer <cmeyer@oktocom.com>
Sent: Saturday, April 18, 2015 3:45 PM
To: Phyllis Wise
Cc: Greg Lykins; Rick Stephens
Subject: Re: yesterday

Thank you, Phyllis. A most interesting afternoon. Chris

From: Phyllis Wise [REDACTED]
Reply-To: Phyllis Wise [REDACTED]
Date: Saturday, April 18, 2015 at 3:17 PM
To: Greg Lykins <gregory.lykins@busey.com>, Rick Stephens <rick@investres.net>, Chris Meyer <cmeyer@oktocom.com>
Subject: yesterday

Dear Greg, Rick and Chris,

Thank you for spending the afternoon with us yesterday. I learned a great deal and I hope you did too. I thought the session was quite wonderful. Jennifer chose to concentrate on what we and Carle are doing in the area of neuroscience and it is definitely an area of strength that brings together our existing engineering and biomedical expertise. Imagine what we could do with a real medical school!

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Just a few thoughts that I thought you would enjoy.

Best wishes for the weekend,
Phyllis

From: Peterson, Dan C <dcpeters@illinois.edu>
Sent: Saturday, April 18, 2015 4:59 PM
To: Phyllis Wise
Subject: Re: Thoughts about tonight's performance at Krannert ...

He's also supported vet med/animal welfare types of org's. It occurs to me that our COM and CVM interface (highlighting the faculty member who is currently partnering with UIC in a clinical trial) might be of interest, and something that distinguishes us from any other CHI area COM.

Sent from my iPhone. Apologies for typos.

On Apr 18, 2015, at 10:52 AM, Phyllis Wise [REDACTED] > wrote:

Thanks for letting me know. I didn't know that.

Sent from my iPhone

On Apr 18, 2015, at 11:33 AM, Peterson, Dan C <dcpeters@illinois.edu> wrote:

You should remember to stress the cancer angle with [REDACTED] too, since [REDACTED]

Sent from my iPhone. Apologies for typos.

On Apr 18, 2015, at 8:32 AM, Phyllis Wise [REDACTED] > wrote:

Greg,

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Thanks again for everything that you are doing!!!
Phyllis

P.S. I am so sorry that I will miss this evening!

From: "Lykins, Greg" <Gregory.Lykins@busey.com>
To: Andreas C. Cancellaris <cangella@illinois.edu>; [REDACTED]

CC: Phyllis M. Wise <Phyllis.Wise@illinois.edu> Dan C Peterson
<dcpeters@illinois.edu>
Sent: Saturday, April 18, 2015 8:21 AM
Subject: Thoughts about tonight's performance at Krannert ...

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[REDACTED] [REDACTED] from [REDACTED] They travel extensively but split their year between [REDACTED] and [REDACTED] [REDACTED] They are a delightful "down to earth" couple. She is an [REDACTED] and he [REDACTED] [REDACTED] They "love" Phyllis ...

I share all of this because [REDACTED] is tremendously excited about the medical school and is considering at least a "seven digit" contribution to the medical school. As you probably know, Rick Stephens and I [REDACTED] on the Medical School and [REDACTED] was tremendously excited. (We also noted the remarkable research work being conducted by a younger Cangellaris!) I will tell you I have never seen him more excited about any project or activity.

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Greg

Sent from my iPad

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<http://www.busey.com>.

From: Rick Stephens <rick@investres.net>
Sent: Saturday, April 18, 2015 5:15 PM
To: Phyllis Wise
Cc: Greg Lykins; Chris Meyer; Jim Leonard
Subject: Re: yesterday

It was really interesting and I felt honored to be invited to attend with such an innovative group. I was pleasantly surprised to hear about the collaboration between Carle and U of I on projects already, much of which gained steam a year ago when simply there was a possibility of a medical school here. That bodes well for the collaboration that will take place once the partnership is formalized.

Excellent execution of the plan is next on the agenda and that is off to a great start. Thanks for including me.

We're still enjoying the movies at Ebertfest. I hope you enjoy your weekend too.

Rick

On Apr 18, 2015, at 3:17 PM, Phyllis Wise [REDACTED] > wrote:

Dear Greg, Rick and Chris,

Thank you for spending the afternoon with us yesterday. I learned a great deal and I hope you did too. I thought the session was quite wonderful. Jennifer chose to concentrate on what we and Carle are doing in the area of neuroscience and it is definitely an area of strength that brings together our existing engineering and biomedical expertise. Imagine what we could do with a real medical school!

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Just a few thoughts that I thought you would enjoy.

Best wishes for the weekend,
Phyllis

From: Peter B. Fox <peterf@fox-companies.com>
Sent: Sunday, April 19, 2015 8:18 AM
To: Phyllis Wise
Subject: Fwd: Re:

This underscores [REDACTED] value!

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

Begin forwarded message:

From: [REDACTED]
Date: April 19, 2015 at 9:18:16 AM EDT
To: Peter Fox <peterf@fox-companies.com>
Subject: Re:

Very positive. [REDACTED] will codevelop Bashir point of care tech. Their investment arm, [REDACTED] will likely invest 300K as part of 1mm round. They want distribution rights for China.

I will lead initially then find CEO.

He likes TEKMILL concept. Possible collaboration on future projects/investment at UI.

He is very sharp. Clear thinking. Good communicator. Humble. I think we connected well.

Also met with [REDACTED] He will bring 300K to Bashir company too. That leaves 300K to find local.

Sent using [CloudMagic](#)

On Sun, Apr 19, 2015 at 8:02 AM, Peter B. Fox <peterf@fox-companies.com> wrote:

How was mtg with [REDACTED]

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]

peterf@fox-companies.com

www.fox-companies.com

From: Ilesanmi Adesida [REDACTED]
Sent: Sunday, April 19, 2015 9:36 AM
To: Phyllis Wise
Subject: Re: Fw: Fwd: Re:

Yes, I knew that this was going on but did not know the investment level. I did not have time to ask the details.
We can talk when we meet.

Ade

On Sunday, April 19, 2015, Phyllis Wise [REDACTED] > wrote:
Ade,

Do you know anything about this?

Phyllis

----- Forwarded Message -----

From: Peter B. Fox <peterf@fox-companies.com>
To: Phyllis Wise <[\[REDACTED\]](#)>
Sent: Sunday, April 19, 2015 8:21 AM
Subject: Fwd: Re:

Sent from my iPhone

Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

Begin forwarded message:

From: [REDACTED]
Date: April 19, 2015 at 9:21:19 AM EDT
To: Peter Fox <peterf@fox-companies.com>
Subject: Re:

Bashir company is named ElectroCyt. First product is test for sepsis to be used bedside in hospital ICU. Tech doe X measurements like my icyt machines but without need for lasers. All electronic, on chip.

Sent using [CloudMagic](#)

On Sun, Apr 19, 2015 at 8:15 AM, [REDACTED] wrote:

Very positive. [REDACTED] will codevelop Bashir point of care tech. Their investment arm, [REDACTED] will likely invest 300K as part of 1mm round. They want distribution rights for China.

I will lead initially then find CEO.

He likes TEKMILL concept. Possible collaboration on future projects/investment at UI.

He is very sharp. Clear thinking. Good communicator. Humble. I think we connected well.

Also met with [REDACTED] He will bring 300K to Bashir company too. That leaves 300K to find local.

Sent using [CloudMagic](#)

On Sun, Apr 19, 2015 at 8:02 AM, Peter B. Fox <peterf@fox-companies.com> wrote:

How was mtg with [REDACTED]

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

From: Phyllis Wise
Sent: Monday, April 20, 2015 9:07 PM
To: [REDACTED] Dan Peterson; Phyllis Wise
Subject: Re: Fw: Fwd: Re:

I only know what is in this email string.

From: [REDACTED] Dan Peterson
To: Phyllis Wise <[REDACTED]>
Sent: Monday, April 20, 2015 7:59 PM
Subject: Re: Fw: Fwd: Re:

Are [REDACTED] investing in a start-up of Rashid Bashir's?

On Sun, Apr 19, 2015 at 9:46 AM, Phyllis Wise <[REDACTED]> wrote:

Dan,

I thought you should see this exchange. [REDACTED] the person who introduced us to the [REDACTED] leadership when we were last in Taiwan. [REDACTED] i.e. [REDACTED] gave the \$500M to National Taiwan University, through the [REDACTED]. [REDACTED] do not know the relationship between [REDACTED] and [REDACTED] but you can be sure that all the money can be traced back to [REDACTED]. [REDACTED] has tried to get us (Ade and me) a meeting with [REDACTED] but has not succeeded yet. [REDACTED] When we were there we met with [REDACTED] who is the [REDACTED] and the [REDACTED] to talk about possible collaborations between them and us around cancer. I don't think anything has come of this.

[REDACTED] has been the person who has orchestrated all of this because he is excited about our COM. I know that [REDACTED] first love is MechSE and I respect that completely. But I think there is incredible capacity in him and he can give to multiple entities.

More to talk about,
Phyllis

----- Forwarded Message -----

From: Phyllis Wise
To: Peter B. Fox <peterf@fox-companies.com>
Sent: Sunday, April 19, 2015 8:45 AM
Subject: Re: Fwd: Re:

Indeed, Peter, I am glad that discussions led to results so quickly. Thanks for getting [REDACTED] more close to our project and to getting to know the important players.

Phyllis

From: Peter B. Fox <peterf@fox-companies.com>
To: Phyllis Wise [REDACTED]
Sent: Sunday, April 19, 2015 8:21 AM
Subject: Fwd: Re:

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

Begin forwarded message:

From: [REDACTED]
Date: April 19, 2015 at 9:21:19 AM EDT
To: Peter Fox <peterf@fox-companies.com>
Subject: Re:

Bashir company is named ElectroCyt. First product is test for sepsis to be used bedside in hospital ICU. Tech doe X measurements like my icyt machines but without need for lasers. All electronic, on chip.

Sent using [CloudMagic](#)

On Sun, Apr 19, 2015 at 8:15 AM, [REDACTED] wrote:

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He is very sharp. Clear thinking. Good communicator. Humble. I think we connected well.

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Sent using [CloudMagic](#)

On Sun, Apr 19, 2015 at 8:02 AM, Peter B. Fox <peterf@fox-companies.com> wrote:

How was mtg with [REDACTED]

Sent from my iPhone
Peter B. Fox
1909 Fox Drive
Champaign, IL 61820
O: 217-351-1430 ext. 15 | C: [REDACTED]
peterf@fox-companies.com
www.fox-companies.com

From: Phyllis Wis [REDACTED]
Sent: Sunday, April 26, 2015 8:28 PM
To: Normand Paquin
Subject: Re: COM start

Ok.

Sent from my iPhone

On Apr 27, 2015, at 7:50 AM, Normand Paquin <[REDACTED]> wrote:

Phyllis,

Robin raised a good point at the Friday morning COM meeting: Joe's presentation will allude to a likely start date of fall 2018 for the college and the fall 2018 start will become public news.

She suggested that we have a clear PR strategy with respect to introducing the fall 2018 date into the mix, especially with respect to donors and the press. Something worth discussing.

2019 did come up. I emphasized that was not something you wanted to entertain and that it should be our goal to do all we can to make 2018 happen. However, she suggested that we should think of how to phrase our current message so as to minimize any problems should 2019 occur. I think it is premature to think about this but it would be worthwhile hearing her out on this matter.

Making fall 2018 needs to be important enough to both Carle and us. At this point, past remarks here and there from Stephanie suggest that Carle's leadership have internally discussed 2019 as plausible and they have not dismissed it. This is good on one hand - they won't go away if we do get delayed. But they can easily use our desire for a 2018 start to gain an advantage during negotiations. We should work to find ways to truly assess where Carle is on 2018 and to find ways to make sure Carle comes to care about 2018 as much as we do.

Normand

Dr. Normand Paquin
Skype: normand_paquin

Te [REDACTED]

Message

From: Phyllis Wise [REDACTED]
Sent: 4/28/2015 12:12:42 PM
To: [REDACTED] and Dan Peters [REDACTED]
Subject: Fw: COM Fundraising: Million Dollar Roundtable Club

FYI

----- Forwarded Message -----

From: Habeeb Habeeb <[REDACTED]>
To: Phyllis M Wise <[REDACTED]>
Sent: Tuesday, April 28, 2015 11:25 AM
Subject: COM Fundraising: Million Dollar Roundtable Club

PS: this is sent to your [REDACTED] email

Phyllis: I have an idea to kickstart the COM fundraising effort locally in our community. I'd like to discuss with you. I know you are traveling and so am I (I am speaking at a conference in Orlando)... But it would be great if we connect before next Tuesday's meeting.

The idea is to start a Million Dollar Roundtable Club. Those sponsoring a table would pledge to donate/raise one million for the COM over the next ten years. It can be themselves only, or with a group of friends. We would be looking for at least 20-25 tables locally to show solid community support for the College of Medicine. I would agree to be the first to sponsor a table and will attempt to find friends to meet that goal for my table. With help from Greg, Rick, Peter and others we will promote and speak about this fund drive at multiple occasions and events.

I have not mentioned this idea to our group but want to do so at next week's breakfast meeting. Very interested in your thoughts and feedback.

Habeeb

Habeeb Habeeb
Sent wirelessly

Message

From: [REDACTED] Dan Peterson [REDACTED]
Sent: 4/28/2015 8:36:34 PM
To: Phyllis Wise [REDACTED] molly tracy [REDACTED]
Subject: Fwd: COM Fundraising: Million Dollar Roundtable Club

----- Forwarded message -----

From: [REDACTED] / Dan Peterson [REDACTED]
Date: Tue, Apr 28, 2015 at 8:35 PM
Subject: Re: COM Fundraising: Million Dollar Roundtable Club
To: Habeeb Habeeb <habeeb@bpcinc.com>

Hi Habeeb,

Thanks for the creative thinking! We should definitely talk about this. Our leadership team that's focused on fund raising for the CoM (me, Molly Tracy, Susan Fitzgerald and Lyn Jones from Carle) have been discussing creating a Founders Society for the CoM with recognition levels at the \$1M, \$5M and \$10M levels, with pledges payable over a 10 year period. Your idea of donors either giving directly or getting the funds is something we should definitely consider.

I will try to call you tomorrow.

Best,
Dan

On Tue, Apr 28, 2015 at 2:28 PM, Habeeb Habeeb <habeeb@bpcinc.com> wrote:

Dan: see below. I don't know if Phyllis saw this email yet or not, but that's the topic I wanted to get feedback on. My cell is [REDACTED] and if there is a better private email address to communicate with you, let me know.

Habeeb

Habeeb Habeeb
Sent wirelessly

Begin forwarded message:

From: Habeeb Habeeb [REDACTED] <[mailto:\[REDACTED\]](mailto:[REDACTED])>
Date: April 28, 2015 at 12:25:43 PM EDT
To: Phyllis M Wis [REDACTED]
Subject: COM Fundraising: Million Dollar Roundtable Club

PS: this is sent to your [REDACTED] email

Phyllis: I have an idea to kickstart the COM fundraising effort locally in our community. I'd like to discuss with you. I know you are traveling and so am I (I am speaking at a conference in Orlando)... But it would be great if we connect before next Tuesday's meeting.

The idea is to start a Million Dollar Roundtable Club. Those sponsoring a table would pledge to donate/raise one million

for the COM over the next ten years. It can be themselves only, or with a group of friends. We would be looking for at least 20-25 tables locally to show solid community support for the College of Medicine. I would agree to be the first to sponsor a table and will attempt to find friends to meet that goal for my table. With help from Greg, Rick, Peter and others we will promote and speak about this fund drive at multiple occasions and events.

I have not mentioned this idea to our group but want to do so at next week's breakfast meeting. Very interested in your thoughts and feedback.

Habeeb

Habeeb Habeeb

Sent wirelessly

From: Joyce Tolliver
Sent: Monday, May 11, 2015 10:00 PM
To: Campbell, R H
Subject: Re: FW: Request for recommendation on SEC representative

I think Matt Wheeler would be perfect.

On Mon, May 11, 2015 at 9:55 PM, Campbell, R H <rhc@illinois.edu> wrote:
Any suggestions.

Roy

Roy Campbell
Sohaib and Sara Abbasi Professor of Computer Science
Siebel Center
201 N Goodwin Av, Urbana, IL 61801-2302
Tel [217-333-0215](tel:217-333-0215) Email rhc@illinois.edu

Appointments etc:
Hobby, Kimberly S <khobb2@illinois.edu>
Phone [\(217\) 300-2508](tel:(217)300-2508)

From: Normand Paquin
Date: Monday, May 11, 2015 at 10:27 AM
To: Roy Campbell
Cc: Gay Miller
Subject: RE: Request for recommendation on SEC representative

Just a gentle reminder to make a recommendation if you can.

Normand

Normand Paquin, PhD, MBA

Associate Director for Research

243 Coordinated Science Laboratory, MC-228

1308 West Main Street

Urbana, IL 61801

Tel: [217-244-6813](tel:217-244-6813)

Fax: [217-244-1764](#)

Email: paquin@illinois.edu

From: Paquin, Normand
Sent: Thursday, May 07, 2015 8:30 AM
To: Campbell, R H
Cc: Miller, Gay Y
Subject: Request for recommendation on SEC representative

Roy,

As you know, we are in the process of negotiating a formal contract with Carle for the new College of Medicine. We are also negotiating an expanded research affiliation agreement between the campus and Carle to cover items that will extend beyond the COM but are nevertheless related to it. This includes joint hires possibly including faculty and staff. Could I request your opinion on whom from the SEC might be able to join a working group looking at these HR issues? We are in the process of putting together a working group centered on this topic. We hope to have resolved the most important issues by mid-July or so.

Could you also confirm that the proper protocol would be for Ade to invite this person to take part if they can and are able? I would pass along your suggestions to Ade.

I am copying Gay to keep her in the loop.

Normand

Normand Paquin, PhD, MBA

Associate Director for Research

243 Coordinated Science Laboratory, MC-228

1308 West Main Street

Urbana, IL 61801

Tel: [217-244-6813](#)

Fax: 217-244-1764

Email: paquin@illinois.edu

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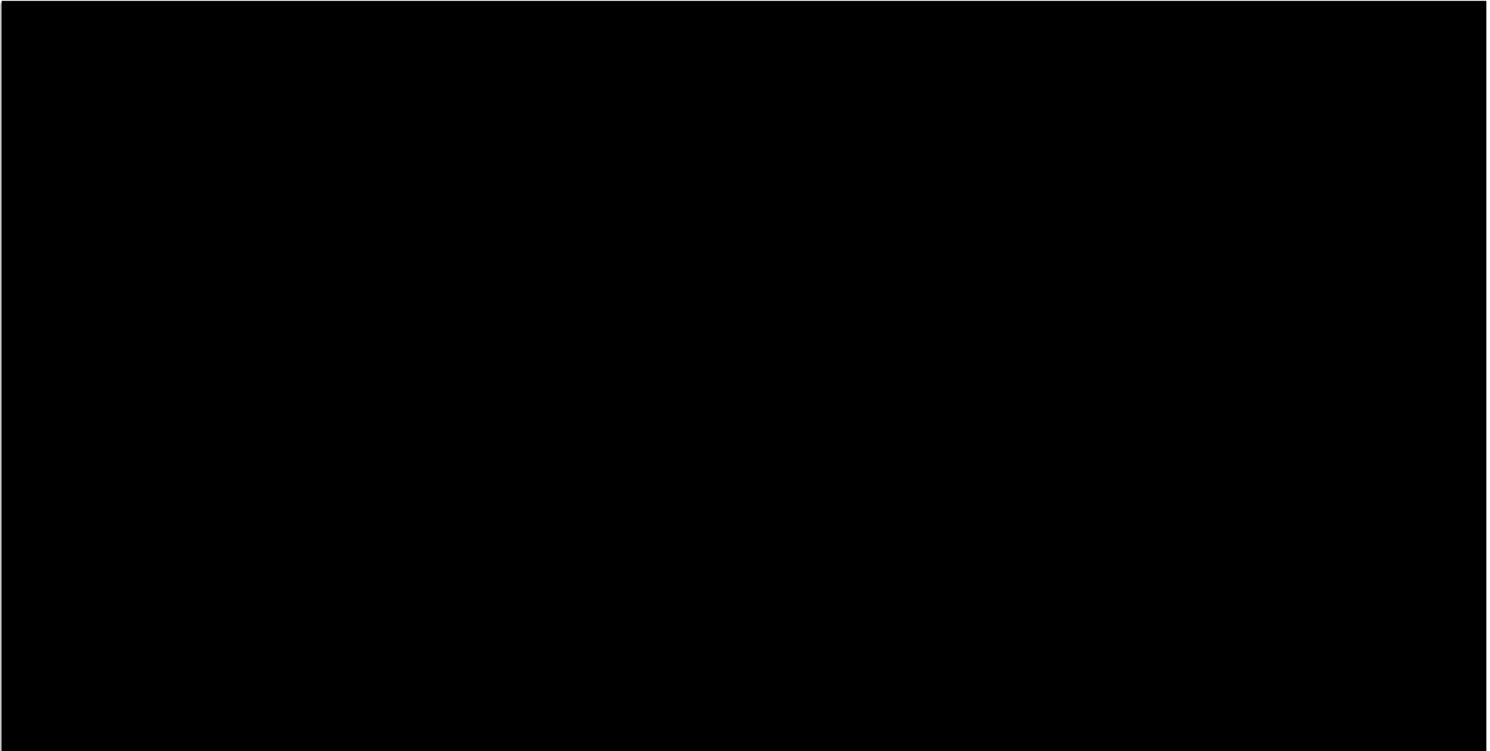
Joyce Tolliver

From: [REDACTED]
Sent: Wednesday, May 20, 2015 9:07 PM
To: Barnhart, Leanne Rodgers
Subject: Fwd: DRAFT: [REDACTED] activity report

----- Forwarded Message -----

From: [REDACTED]
To: jeanne1@illinois.edu
Sent: Tue, 16 Dec 2014 22:19:45 -0500 (EST)
Subject: DRAFT: [REDACTED] activity report

DRAFT



From: [REDACTED]
Sent: Wednesday, May 20, 2015 9:08 PM
To: Barnhart, Leanne Rodgers
Subject: Fwd: contact reports

----- Forwarded Message -----

From: Phyllis Wise [REDACTED]
To: [REDACTED] and Dan Petersen [REDACTED], Leanne Courson [REDACTED], LRC [REDACTED]

Sent: Sun, 07 Dec 2014 23:38:10 -0500 (EST)

Subject: contact reports

Dear Dan and Leanne (and I hope you will share these with Molly), I met or had phone calls with several people this week. Here is a summary of our conversations:

12/3/14 [REDACTED] and I met for the first time in [REDACTED] CA. He is a good friend and colleague of [REDACTED]. [REDACTED] met him at a RAND health board meeting but he has not been attending recently; [REDACTED] urged me to meet with him. He is the former [REDACTED] and grew it through some pretty tumultuous times. His real claim to fame is his goal of making health care delivery more efficient. His newest book [REDACTED] is all about that and about leadership. I had emailed back and forth with him and had sent him the FAQs for the COM. I described our goal of creating a COM. He was very excited about it. Key points he made:- I told him our focus would not be on training a large group of primary care physicians, and therefore we would not be helping the need for lots more physicians. He said actually we would because we would be educating a different kind of doctor who would have a ripple effect on physicians.- He emphasized that we need to think about the humanistic aspects of medicine and not training just a group of robotic engineers.- He told me that he thought the [REDACTED] would be interested in this. Urged me to contact [REDACTED] and [REDACTED] I think [REDACTED] would be more important. I tried to meet with him the last time I was in Seattle. It might be worth a special trip there just to see him.- He urged me to meet with people at the [REDACTED]. I know [REDACTED] a little and could try to contact him.- Most important point: he knows [REDACTED] really well. Apparently contacted him right after our meeting. Will be seeing him next Thursday and will talk with him. I told him about our dinner and our hope that [REDACTED] would become an investor. I think he will urge him in that direction.- I told him that we would keep him in the loop through email, Skype, and future visits.

[REDACTED] spoke with [REDACTED] about our desire to raise funds for an endowed deanship for ACES in Bob Easter's name. I followed the guidelines that Dan had given me. [REDACTED] said he would not be able to give \$2.5 million. I asked him to think about what he would be willing to contribute and told him that we were considering 3-5 others who we thought would resonate with this initiative. He said he would get back to me.- follow up: contact him after the new year. Maybe Dan and I can do this together.

[REDACTED]. I met [REDACTED] in his office and went to lunch with him. He showed me around his office and introduced me to about 4-5 others who he had recruited from Illinois. He told me that he had hired many others. I asked him whether he would be willing to host a thought leader dinner with his business associates. He said he would be happy to. He seemed really pleased to be able to do this and said he puts on a great party. He told me all about his athletic experiences at Illinois and all the people he has kept up with. I would guess that he could easily host more than one dinner. I complimented on his multiple gifts. He will be meeting with Jan Erkert in the spring - I suspect that he will add to his gift in memory of [REDACTED]. But his first love is definitely CEE. Perhaps the thought leader dinner should be with Andreas and me. I approached him about his thoughts about a legacy gift and the importance of that to our next campaign. He seemed to be willing to think about this.

[REDACTED] I met with [REDACTED] and [REDACTED] described to me the COM that he wants to form with [REDACTED] comprehensive hospital in the area [REDACTED] concentrates on [REDACTED] I was not impressed with the embryonic stage of this idea and how ill-

conceived the idea really is. In fact [REDACTED] spoke disparagingly of what [REDACTED] has in mind. - I will follow up with [REDACTED]
[REDACTED] I don't think there is any need to follow up with them.

[REDACTED] Mark Taylor took me to visit with them. [REDACTED] can [REDACTED]
[REDACTED] He memory is crystal clear and he remembers everything from his time at Illinois. [REDACTED] is just lovely
and speaks fondly of their time at Illinois. We spent an hour there. I am sure that Mark will give you a thorough review
of the visit. Bottom line is that Mark will send them material on iPromise and hope that they will be interested.

[REDACTED] I already contacted Molly about follow-up since she is their PM. [REDACTED] was [REDACTED] this
time than last but [REDACTED] He is [REDACTED] now has [REDACTED] [REDACTED] She
[REDACTED] said that she hopes she lives long enough to make the endowed professorship into an endowed chair. But they do not
know how much [REDACTED] I asked about [REDACTED] who we had tried to arrange a separate meeting
with but were unsuccessful. She said she was a godsend helping as much as she could. [REDACTED] never mentioned their
[REDACTED] r.follow-up: I have told Molly to get in contact with their financial person. She will follow up.
that's it. Phyllis

From: [REDACTED]
Sent: Wednesday, May 20, 2015 9:09 PM
To: Barnhart, Leanne Rodaers
Subject: Fwd: dinner with [REDACTED] and [REDACTED] and [REDACTED]

----- Forwarded Message -----

From: Phyllis Wise [REDACTED]
To: Leanne Courso [REDACTED] LRC <[REDACTED]> and Dan Peterso

Sent: Sat, 29 Nov 2014 09:48:43 -0500 (EST)

Subject: dinner with [REDACTED] and [REDACTED]

Dear Leanne (I don't know which email you are using) and Dan (please share this with Molly - I don't have her personal email address), Dick and I had dinner with the [REDACTED] and the [REDACTED] last night at Saranello's Restaurant in Wheeling. [REDACTED] had chosen the restaurant. Conversation was really rich with the two couples comparing notes of where they grew up, who they knew in common, their experiences at Illinois. They graduated three years apart - so they overlapped one year - but their common experiences were really because they went to high schools close to each other. [REDACTED] are sports fanatics so there was lots of conversation about both college and professional sports from the Black Hawks, Chicago Bears, the Cubs and White Socks to Illinois football, basketball, Mike Thomas, the coaches - actual scores, records, people from the early 1900's to the present. I must admit to being a bit naive about the details and just an observer to this part of the evening.

Major points:1. [REDACTED] said that I did a great job of explaining the COM - how it was different and distinctive. She said many in the audience had never heard about the initiative and their knee jerk reaction would be why do we need another one, so it was a very good introduction.2. [REDACTED] asked me what they could do. I explained that it would be wonderful for them to help to organize small dinners to explain this further and to get support for the initiative. Both couples are happy to do this. But I think they will need ideas for who to invite and what/how "hosting" really means.

[REDACTED] pointed out that they have been asked to organize dinners for CS. I said that we do not want to "hijack" any of those dinners, even though there is overlap between what CS wants to do and how the COM might help them to meet their next goals. As we have all discussed it is important not to "steal" from the advancement teams that work for the colleges to move the COM agenda forward.3. [REDACTED] asked what I thought of the new president. I was very positive and said that we had every reason to believe he would understand the importance of differentiation of the campuses.

We talked about whether the Killeen's would live mainly in U-C or Chicago and how that would impact our campus.4. [REDACTED] talked about her interests in cancer and how she wanted our campus to be involved in her initiative.

Rashid has already voiced support. I told her how much the COM would benefit what she wants to achieve. I will forward her email about this if you do not have a copy of it.5. They talked about contributing to the Renaissance project for the State Farm Center. Both have given.6. I talked about the next campaign and that we were holding thought leader dinners to lead up to starting the campaign. They are both aware of this. I told them that I hoped they would continue to participate - hopefully hosting one. They are both amenable.7. We talked about Governor Rauner and what they thought. I told them that I was really hopeful - that he would be all about economic development and that we had to convince him about the importance of the research university in meeting that goal.

All in all a very pleasant dinner - you don't have to worry about holding a conversation when [REDACTED] are involved. Phyllis